



CIVIL SERVICE COMMISSION

Monday, July 10, 2017

COMMISSIONERS
John Costa - Vice Chair
Ron Le Doux
Don Nelson
Andrae Randolph - Chair
Rick Ward

AGENDA

145 Fulweiler Avenue, Suite 200
Auburn, California 95603

Lori Walsh, Human Resources Director
Paula Hood, Commission Clerk
Main Office: 530.889.4067
www.placer.ca.gov

Placer County is committed to ensuring that persons with disabilities are provided the resources to participate fully in its public meetings. If you are hearing impaired, we have listening devices available. If you require additional disability-related modifications or accommodations, including auxiliary aids or services, please contact the Executive Secretary. If requested, the agenda shall be provided in appropriate alternative formats to persons with disabilities. All requests must be in writing and must be received by the Executive Secretary five business days prior to the scheduled meeting for which you are requesting accommodation. Requests received after such time will be accommodated only if time permits.

MEETING LOCATION:

Placer County Child Support Services

1000 Sunset Boulevard, Suite 200
Rocklin, CA 95765-- 530.889.4060

3:00 PM

OPEN SESSION

Roll Call

Flag Salute

- I. **Agenda Approval**
- II. **Approval of Minutes from previous meeting – June 22, 2017**
- III. **Public Comment:** Persons may address the Commission on items not on this agenda. Please limit comments to 3 minutes per person since the time allocated for Public Comment is 15 minutes. If all comments cannot be heard within the 15-minute time limit, the Public Comment period will be taken up at the end of the regular session. The Commission is not permitted to take any action on items addressed under Public Comment.
- IV. **Old Business**
 - A. Request to create the classification specification of Staff Services Manager, salary grade MGMT 426.

V. New Business

- A. Request for approval to extend Work out of Class Pay pursuant to Placer County Code Section 3.08.510 (C)(5)(c) for employees assigned to the Department of Administrative Services, Library, and Health and Human Services (2).
- B. Request for approval of the results of the Fiscal Study pertaining to the Accountant/Auditor series:
 - 1. The proposed revisions to the classification specifications for the following classifications:
 - a. Accountant Auditor I with classification specification updates and title change to Accountant I;
 - b. Accountant Auditor II with classification specification updates and title change to Accountant II;
 - c. Accountant Auditor, Senior with classification specification updates and title change to Accountant, Senior;
 - d. Accountant Auditor, Supervising with classification specification updates.
 - 2. Creation of the following classifications:
 - a. Auditor I at the recommended salary grade of PROF 208 (\$4,606.62 - \$5,599.40 monthly);
 - b. Auditor II at the recommended salary grade of PROF 220 (\$5,332.86 - \$6,482.11 monthly);
 - c. Auditor, Senior at the recommended salary grade of PROF 232 (\$6,173.38 - \$7,503.79 monthly);
 - d. Accountant, Supervising at the recommended salary grade of MGMT 424 (\$6,403.39 - \$7,783.38 monthly).
 - 3. The administrative placement of the incumbents into the recommended classifications as indicated on the allocation spreadsheet (Attachment A), pursuant to Placer County Code section 3.08.480.
- C. Request for approval to reclassify an Executive Secretary to the classification of Administrative Technician and the non-competitive promotion of the current incumbent at the County Executive's Office-General Liabilities division.

- D. Request for approval of revisions to the classification specifications of Economic Development Specialist and Economic Development Specialist-Senior

VI. COMMUNICATIONS - Reports to the Commission are informational items only. No action will be taken.

- A. Provisional Appointments – (One) Library
- B. Staff Reports and Correspondence
 - 1. Staff updates-None
- C. Commissioner Comments

CLOSED SESSION

VII. PUBLIC EMPLOYEE PERFORMANCE EVALUATIONS

- A. Evaluation of performance of various Placer County employees pursuant to Government Code Section 54957 and pursuant to Placer County Chapter 3 Section 3.04.650.

OPEN SESSION

- VIII. Report of action taken in closed session pursuant to Government Code Section 54957.1.
- IX. Approval of merit increases for classified employees pursuant to Section 3.04.650 (progression in steps) of the Placer County Code.
- X. Adjournment

Civil Service Commission – Upcoming Regular Meeting

Monday, August 14, 2017 – 2:00 p.m.-Placer County Administrative Center – Tahoe City

775 North Lake Boulevard, Tahoe City CA 96145

530.581.6200



CIVIL SERVICE COMMISSION

Thursday, June 22, 2017

Special Meeting Minutes

COMMISSIONERS
John Costa - Vice Chair
Ron Le Doux
Don Nelson
Andrae Randolph - Chair
Rick Ward

145 Fulweiler Avenue, Suite 200
Auburn, California 95603

Lori Walsh, Human Resources Director
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MEETING LOCATION:

Placer County Child Support Services

1000 Sunset Blvd. 2nd Floor
Rocklin, CA 95765 --- 530.889.4060

1:30 PM OPEN SESSION

Roll Call –All Commissioners were present at roll call.

Flag Salute – Led by Commissioner Ward.

I. Agenda Approval

It was moved by Nelson and seconded by LeDoux that the agenda be approved. Motion carried unanimously.

II. Approval of Minutes from previous meetings

May 8, 2017

It was moved by LeDoux and seconded by Costa to approve the May 8, 2017 minutes. Motion carried unanimously.

June 12, 2017

Commissioner Randolph adopted the June 12, 2017 minutes.

- III. Public Comment:** Persons may address the Commission on items not on this agenda. Please limit comments to 3 minutes per person since the time allocated for Public Comment is 15 minutes. If all comments cannot be heard within the 15-minute time limit, the Public Comment period will be taken up at the end of the regular session. The Commission is not permitted to take any action on items addressed under Public Comment.

IV. Old business

The Commission reported on the findings from a disciplinary hearing held on March 21, 23, 24, and April 7, 2017. On May 4, 2017 the Commission upheld the Department's disciplinary decision by a vote of 4-1.

V. New Business

- A.** Request for approval of Work out of Class Pay pursuant to Placer County Code Section 3.08.510 (C)(5)(c) for an employee assigned to the Department of Public Works and Facilities.

It was moved by LeDoux and seconded by Costa that the Commission approve the work out of class request submitted by the Department of Public Works and Facilities.

Motion carried unanimously.

- B.** Request approval for revision to the classification specification of Management Analyst-Senior for the County Executive's Office.

It was moved by LeDoux and seconded by Nelson that the Commission approve the revision to the classification specification of Management Analyst-Senior for the County Executive's Office.

Motion carried unanimously.

- C.** Request to create the classification specification of Staff Services Manager, salary grade MGMT 426.

The Commission discussed the creation of the classification specification of Staff Services Manager. No decision was reached. The Commission unanimously decided to continue this matter until the July 10, 2017 CSC meeting.

VI. COMMUNICATIONS - Reports to the Commission are informational items only. No action will be taken.

- A.** Provisional Appointments – None reported
- B.** Staff Reports and Correspondence
1. Staff updates
Nothing to report.
- C.** Commissioner Comments
No comments.

CLOSED SESSION – 2:40 p.m.

VII. PUBLIC EMPLOYEE PERFORMANCE EVALUATIONS

- A.** Evaluation of performance of various Placer County employees pursuant to Government Code Section 54957 and pursuant to Placer County Chapter 3 Section 3.04.650.
- B.** Evaluation of performance of the Human Resources Director pursuant to Government Code Section 54957.

OPEN SESSION 2:52 p.m.

- VIII.** Report of action taken in closed session pursuant to Government Code Section 54957.1. **No action to report.**
- IX.** Approval of merit increases for classified employees pursuant to Section 3.04.650 (progression in steps) of the Placer County Code. **It was moved by LeDoux and seconded by Ward that the classified merit increases be approved. Motion carried unanimously.**
- X.** **Adjournment 2: 56 p.m.**

There being nothing further to come before the Commission, it was moved by Costa and seconded by LeDoux that the meeting be adjourned. Motion carried unanimously.

PLACER COUNTY CIVIL SERVICE COMMISSION

Andrae Randolph, Chair

Paula Hood, Commission Clerk



PLACER COUNTY
HUMAN RESOURCES DEPARTMENT
145 Fulweiler Avenue, Suite 200
Auburn, California 95603-4578

CIVIL SERVICE COMMISSION
John Costa
Ron Le Doux
Don Nelson
Andrae Randolph
Rick Ward

Lori Walsh, Human Resources Director
Main Office: 530.889.4060
FAX: 530.886.4626
www.placer.ca.gov

MEMORANDUM

To: Civil Service Commission
From: Lori Walsh, Human Resources Director
By: Hedy Dehghan, Human Resources Manager
Date: July 10, 2017
Subject: Request for Creation of a new Classification Specification – Staff Services Manager

Recommendation

It is recommended that the Civil Service Commission approve the creation of a new classification specification of Staff Services Manager and recommend to the Board of Supervisors placement in salary grade MGMT 426 (\$6,553.54 - \$ 7,965.86/monthly).

Background

As your Commission is aware, the County embarked on a classification study last fall to include a review of the professional and management classifications utilized in the fiscal functional area on a County-wide basis. As a result of meeting with the various departments that utilize these classifications during the course of this study, the need for a new classification outside the scope of the fiscal study was identified. As the Human Resources Department (HR) continued to engage in these conversations, multiple departments conveyed a need for a management-level classification, responsible for non-fiscal or non-budget related duties and responsibilities requiring management-level discretion and decision-making.

Conceptually, this management-level classification will serve in an advisory role and provide highly responsible and complex professional assistance to executive management in areas such as organizational development, administration and staffing, and strategic planning. This classification will manage, through lower-level supervisors, and engage in administrative functions of large, complex departments with multiple divisions, budget units, and larger staff resources. These administrative functions will include, but not be limited to, human resources and/or general administrative support, regulatory and legislative compliance, policy analysis and development, public information and community outreach, analyses of organization systems and procedures,

and grants and contracts administration. This proposed classification will have an active role on the management team of the assigned department, including participating in administrative and programmatic/operational strategic planning, policy analysis and development, change management, and legislative and regulatory compliance initiatives. Further, this new classification will provide a career path for the Staff Services Analyst series for the larger departments that break out the management oversight of administration as opposed to their fiscal operations.

Basis for Recommendation

This newly proposed classification of Staff Services Manager will fill a void that some of our operating departments currently operate under. HR recognizes the need for this new classification to assist our departments in meeting their overall operating needs and in broadening the career path for current County employees. Any future appointments to this classification will be made through a competitive recruitment process.

Attached for the Commission's consideration is a copy of the proposed classification specification for Staff Services Manager.

Attachment: Classification Specification

STAFF SERVICES MANAGER

DEFINITION

To plan, organize, direct, supervise, and manage the activities of a department-wide function or major service area; serve in an advisory role and provide highly responsible and complex professional assistance to executive management staff in areas such as organizational development, staffing, strategic planning, business processes, legislative analysis, and related areas; research and analyze departmental practices and procedures and develop recommendations for organizational, programmatic, policy, and procedural improvements and updates; coordinate assigned areas of responsibility as a representative of the department with other County departments and divisions and with external stakeholders.

DISTINGUISHING CHARACTERISTICS

The manager level recognizes positions that provide full and functional management responsibility for a division or program area within a department. Performance of the work requires the use of considerable independence, initiative, and discretion within established guidelines.

This class is distinguished from the Staff Services Analyst, Senior by having substantive and significant management level responsibility over a specific area or specialty, including short- and long-term planning and development and administration of department-wide policies, procedures, and services. This class is further distinguished from the Administrative Services Officer series in that the latter has responsibility for implementing and maintaining the budget process and fiscal recordkeeping and reporting operations with day-to-day oversight and participation in fiscal/accounting operations and budget preparation/monitoring activities for assigned department/division.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from higher level management staff.

Exercises direct supervision over supervisory, professional, technical, and clerical personnel.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

Assume full management responsibility for assigned administrative, operational, and programmatic activities and analyses in assigned areas of responsibility including organizational development, staffing, department wide business processes, policy, procedural, and legislative analysis.

PLACER COUNTY

Staff Services Manager (Page 2)

Research and evaluate the effect of current and pending legislation affecting the department and County; prepare critiques and research papers; advise management and recommend and implement policy and procedural changes.

Develop, recommend, and implement program goals and objectives within assigned department; oversee and participate in the development and implementation of strategies and work plans for the achievement of these goals.

Provide leadership and supervision to professional, technical, and administrative support staff, either directly and through subordinate staff; coordinate staff training; participate in selection of staff; conduct performance evaluations; recommend and implement discipline procedures as appropriate; organize, assign, review, and evaluate work products, methods, and procedures.

Contribute to the overall quality of the assigned areas of responsibility by developing, reviewing, and implementing policies and procedures to meet legal requirements and departmental needs; continuously monitor and evaluate the efficiency and effectiveness of service delivery methods and procedures; assess and monitor the distribution of work, support systems, and internal reporting relationships; identify opportunities for improvement; direct the implementation of change; prepare various staff reports on operations and activities.

Develop departmental standards for projects, programs, and studies including methodology, deliverable templates, and performance measurements.

Provide consultation to meet staff needs including recommending, designing, and coordinating changes to both business practices and specific technology solutions.

Represent assigned department on personnel matters such as staffing, recruitment, selection, classification; act as departmental liaison with the Human Resources Department; provide or coordinate staff training; assist in working with employees to correct deficiencies and/or implementing discipline procedures.

Lead and participate in internal and interagency technical work groups to gather information for policy and decision making and to serve as an advisor in advancing and representing the priorities and interests of the department.

Interpret departmental business needs and identify and analyze critical issues; recommend solutions and resolve complex problems; develop new processes and procedures to meet requirements and anticipated changes; advise staff and management on changes.

Plan, organize, manage, and participate in conducting productivity and efficiency studies, performance audits, management reviews, and administrative analyses of organization systems and procedures; develop cost analyses and perform program evaluations; prepare complex analytical and statistical reports.

Serve as a liaison between the department and federal and state legislators, other government entities, interest groups, and other stakeholders to advance and represent the priorities and interests of department and County.

Develop consultant requests for proposals for professional services and administer the advertising and bid processes; evaluate proposals and recommend project award; negotiate contracts and agreements and administer same after award.

Make presentations to the public, community groups, various committees, and elected boards.

Build and maintain positive working relationships with co-workers, other County employees, and the public using principles of good customer service.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

- Principles and practices of employee supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures.
- Standard accepted principles and practices of motivation, team building, and conflict resolution.
- Administrative principles and practices, including goal setting, program development, implementation, and evaluation, and project management.
- Organizational and management practices as applied to the analysis, evaluation, development, and implementation of programs, policies, and procedures.
- Principles and practices of local government and county administration, organization, programs and functions.
- Advanced principles, practices, concepts, theories, research methods, and sources of information related to assigned area of responsibility.
- Principles and techniques of administrative analysis, including workload measurement, work flow and layout, work simplification, and systems and procedure analysis.
- Applicable federal, state, and local laws, regulations, ordinances, and organizational policies and procedures related to areas of responsibility.
- Practices of researching issues, evaluating alternatives, making sound recommendations, and preparing and presenting effective reports.
- Statistical methods and analysis and the use and interpretation of statistics in reports
- Modern office practices, methods, computer equipment, and applications related to the work.
- Techniques for effectively representing the County in contacts with governmental agencies, community groups, various business, professional, educational, and regulatory organizations, and the public.

Ability to:

- Provide leadership and technical guidance as an advisor in assigned area of responsibility including performing varied duties that may include uncertainty in approach, methodology, or interpretation and evaluation processes, as well as continuing changes in program, technological developments, or conflicting requirements.
- Develop and implement goals, objectives, policies, procedures, new techniques, establish work standards, and internal controls for assigned program areas.
- Provide administrative and professional leadership and direction for assigned programs and projects.
- Conduct complex research projects, evaluate alternatives, make sound recommendations, and prepare effective technical reports.
- Interpret, apply, and ensure compliance with federal, state, and local policies, procedures, laws, and regulations.
- Plan, organize, direct, and coordinate the work of assigned staff; delegate authority and responsibility.
- Select, train, motivate, and evaluate the work of staff and train staff in work procedures.
- Understand the organization and operation of assigned department and the County as necessary to assume assigned responsibilities.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- Prepare comprehensive, clear, and highly complex reports.
- Communicate clearly and concisely, both orally and in writing.
- Effectively represent the department and County with those contacted during the course of work.
- Establish and maintain positive working relationships with co-workers, other County employees, and the public using principles of good customer service.
- On a continuous basis, know and understand all aspects of the job; intermittently analyze work papers and special projects; identify and interpret technical and numerical information; observe and problem solve operational and technical policies and procedures; and explain County and Department policies and procedures to the general public and County staff.
- On a continuous basis, sit at desk for long periods of time; intermittently twist to reach equipment surrounding desk; walk, stand, bend, squat, kneel, or twist, carry materials or retrieve/ return files from drawers; perform simple grasping and fine manipulation; use telephone, and write or use a keyboard to communicate through written means or enter/retrieve data from computer; and lift light weight.

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Five years of increasingly responsible work experience managing programs and/or conducting detailed analysis requiring the preparation and submission of findings with recommendations to executive management staff, including two years of supervisory responsibility.

Training:

Equivalent to a Bachelor's degree from an accredited college or university with major coursework in public or business administration, political science, or a related field.

License or Certificate:

May need to possess a valid driver's license as required by the position and in accordance with the California Vehicle Code. Proof of adequate vehicle insurance and medical clearance may also be required.

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PLACER COUNTY
Staff Services Manager (Page 2)

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Provide consultation to meet staff needs including recommending, designing, and coordinating changes to both business practices and specific technology solutions.

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Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Five years of increasingly responsible work experience managing programs and/or conducting detailed analysis requiring the preparation and submission of findings with recommendations to executive management staff, including two years of supervisory responsibility.

Training:

Equivalent to a Bachelor's degree from an accredited college or university with major coursework in public or business administration, political science, or a related field.

License or Certificate:

May need to possess a valid driver's license as required by the position and in accordance with the California Vehicle Code. Proof of adequate vehicle insurance and medical clearance may also be required.

MEMORANDUM

DATE: July 10, 2017
TO: Civil Service Commission
FROM: Lori Walsh, Director of Human Resources
SUBJECT: Work-Out-of-Class Pay

We have received the following departmental request(s) for work-out-of-class pay extensions. Listed below are the department(s), employee number(s), and time period(s) requested. The Human Resources Department has previously approved work-out-of-class pay and we are requesting the Civil Service Commission approve additional extension(s) as per Placer County Code 3.08.510 C.5.c. Supporting documentation has been attached to this memo.

<u>Department</u>	<u>Employee Number</u>	<u>Dates</u>	<u>Approximate</u>
Administrative Services	51234764	8/18/2017-07/06/2018	323 days
HHS	01163231	8/03/2017-02/02/2018	180 days
HHS	01158760	8/03/2017- 02/02/2018	180 days
Library	51234427	7/02/2017-01/02/2018	180 days

Recommendation: It is recommended that the Civil Service Commission approve the above work-out-of-class pay extension(s) in recognition of the duties being performed.

CC: Jeff Brown – HHS
Mary George – Library Services
Jerry Gamez-Administrative Services



TO: Lori Walsh, Human Resources Director
FROM: Jerry Gamez, Director of Administrative Services
DATE: July 10, 2017
SUBJECT: Request to Extend Work Out of Class (WOC) Pay

ACTION REQUESTED

Employee ID: 51234764
Current Classification: Administrative Clerk Journey
WOC Classification: Buyer I
Initial WOC Effective Date: February 18, 2017, PP 19, FY16/17
Requested Extension Eff. Date: August 18, 2017, PP06, FY17/18
Expiration Date of WOC: July 6, 2018, PP02 FY18/19

REASON FOR WOC

Fill Behind a: ☐ Leave of Absence ☐ Retirement ☐ Resignation ☐ WOC

Other: ☐ Peak Workload/Special Project ☐ Pending Reclassification / Reallocation
☒ Other: Backfilling Buyer II which transitioned to the ERP project Team

PLAN TO END TEMPORARY WOC

☐ Request Submitted to Fill Vacancy ☐ Completion of Peak Workload / Special Project
☐ Return of Incumbent from LOA ☒ Other – Work out of class will end with completion of ERP Project on July 1, 2018.

BACKGROUND

This request is to extend the Work out of Class assignment for the current incumbent as a Buyer I through July 6, 2018. The term on the requested Work out of Class extension coincides with the Enterprise Resource Planning Project's "go-live" timeline projected for the beginning of the Fiscal Year 2018/19, July 1, 2018. This Buyer I position serves as part of a team of five individuals providing procurement services and support to County Departments. These duties include processing new bids, solicitation of quotes, the renewal of approximately 200 annual Blanket Purchase Orders, and the rebidding of an estimated 60 Blanket Purchase Orders during the Work Out of Class period being requested. With the reassignment of the Buyer II to the Enterprise Resource Planning (ERP) project, a significant gap in the coverage for the Procurement Division was created. The Buyer I position has assumed the responsibilities for many of the projects that were handled by the previous incumbent, and assists the Division by handling many of the smaller bids and quotes, freeing other staff up for the larger projects. This Buyer I assignment has enabled the Division to better allocate other staff to focus on larger, more complex bid and request for proposal projects without taking additional time away to work on smaller bids and quotes. This request will provide the Department ample time to evaluate alternate staffing models for providing continued support to the County's ERP project, while also providing coverage for work on service level agreements for the acquisition of goods & services made on the County's behalf. Without this Buyer I assignment, the workload of other staff in this division would increase expeditiously and, as a result, could become back-logged. Approving this work out of class assignment is integral to the successful operations of the Procurement Division. While

Request for Work Out of Class (WOC) Pay

some of the Administrative Clerk Journey duties continue to be performed by this employee, a part-time, temporary employee is also being utilized to assist in completing this workload.

RECOMMENDATION

It is therefore recommended that this employee be approved to receive WOC pay. Consistent with the guidelines presented under the Placer County Code section 3.08.510, and the PPEO and PCDSA MOUs, additional compensation for WOC pay shall be no less than a minimum of five percent (5%) or exceed a maximum of fifteen percent (15%). The specific amount of the additional compensation will be determined by an analysis of the employee's current classification and the proposed WOC classification and in no case will exceed the amount the employee would receive if promoted to the WOC classification.

AUTHORITY

In line with the principle that an employee assigned higher level work or assigned to work in a position having discernibly higher job duties should receive higher pay, positions within the classified service may be eligible for WOC assignments. Individual employees may be certified by the Human Resources Department as being eligible for WOC pay when so assigned by the appointing authority or designee of that appointing authority (PCC sec. 3.08.510, PPEO and PCDSA MOUs).

PROVISIONS FOR WOC ASSIGNMENTS

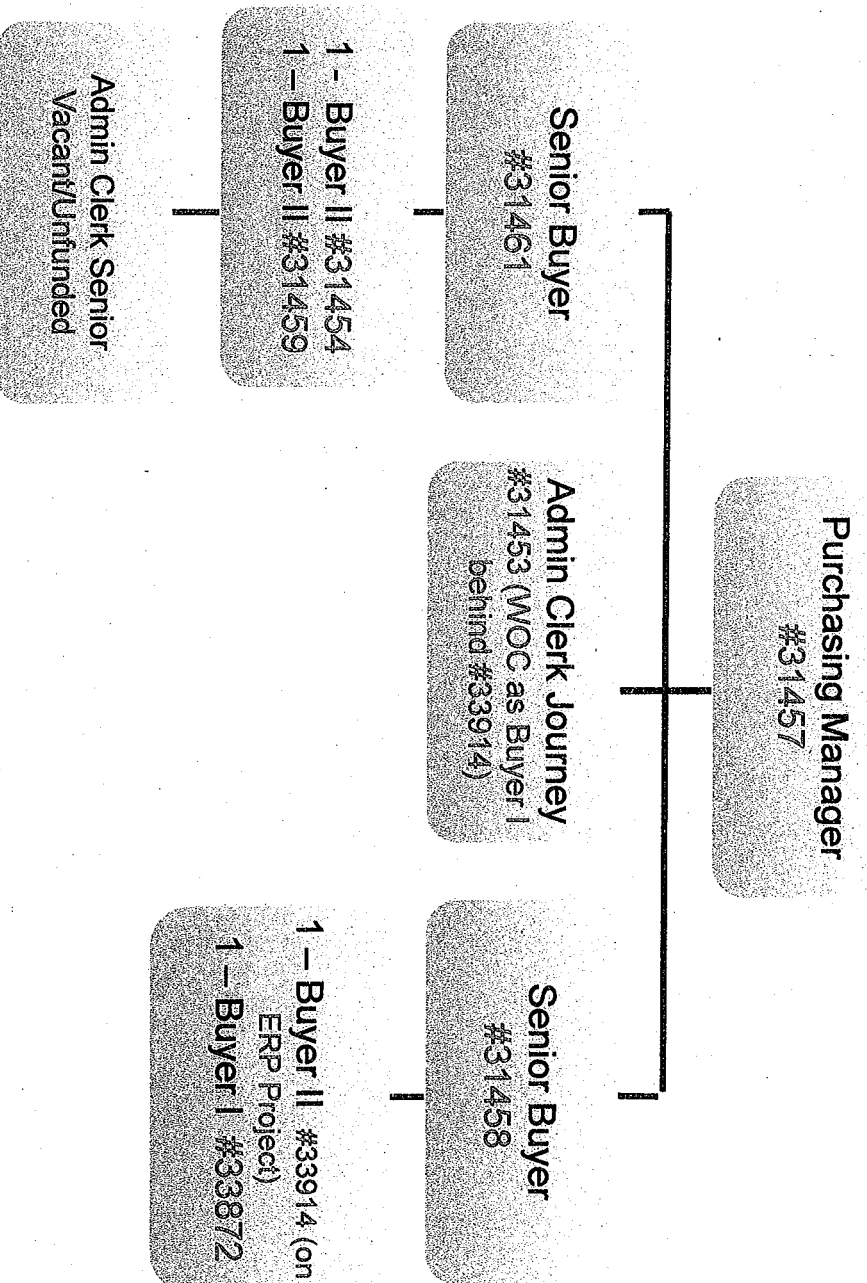
- In consideration for the temporary nature of the WOC assignment and the fact that appointment has not been made to the WOC classification, the following guidelines apply:
 - For evaluation purposes, employee is rated in his or her current classification.
 - Evaluation rating periods are not impacted by WOC assignments.
 - Employee will continue to be eligible for merit increases as outlined in PCC section 3.04.650.
 - Employee will continue to accrue seniority in his/her regular position/classification.
 - Employee will continue to receive the benefit package associated with his/her regular position/classification.
- WOC compensation will not be considered or paid for assignments for two workdays or less or for training purposes.
- The department must notify the Human Resources Department when the WOC employee has a leave of absence that exceeds ten (10) working days since this will result in ending WOC compensation. The department must then notify Human Resources and submit the appropriate paperwork prior to continuing the employee in a WOC assignment upon his/her return from leave.
- Additional compensation for WOC shall be no less than a minimum of five percent (5%) or exceed a maximum of fifteen percent (15%). Salary amount will be rounded down to the nearest whole percentage as determined by Human Resources.
- Additional compensation will be reported as pensionable special compensation if it meets the criteria defined by CalPERS.
- While this WOC request is for a period of time not to exceed 180 days, it may end earlier as determined by the appointing authority.
- Employee is not to begin the WOC assignment until the Human Resources Department certifies the individual is eligible for WOC pay.
- The requesting department is responsible for sharing this WOC request and the provisions set forth for a WOC assignment with the employee.



Information verified by HR

Updated 1/2017

**ADMINISTRATIVE SERVICES DEPARTMENT
PROCUREMENT SERVICES DIVISION
FY 16/17**



10 Positions



TO: Lori Walsh, Human Resources Director
FROM: Jeff Brown, Health and Human Services Director
DATE: July 10, 2017
SUBJECT: Request for Work Out of Class (WOC) Pay

ACTION REQUESTED

Employee ID: 01163231
Current Classification: Client Services Program Specialist - Senior
WOC Classification: Client Services Program Specialist - Supervisor
Initial WOC Effective Date: February 6, 2017
Requested Extension Eff. Date: August 3, 2017
Expiration Date of WOC: February 2, 2018

REASON FOR WOC

Fill Behind a: ☐ Leave of Absence ☐ Retirement ☐ Resignation ☐ WOC

Other: ☐ Peak Workload/Special Project ☒ Pending Reclassification / Reallocation
☐ Other:

PLAN TO END TEMPORARY WOC

☐ Request Submitted to Fill Vacancy ☐ Completion of Peak Workload / Special Project
☐ Return of Incumbent from LOA ☒ Other - Pending Reclassification / Reallocation

BACKGROUND

Due to recent staffing changes and a review of the organizational structure within the Public Health Division of Health and Human Services, it became apparent that a first line supervisory position in the Children's Medical Services Programs was necessary. The employee was assigned supervisory responsibilities in February 2017 and was placed into a WOC assignment. The Human Resources Department is currently conducting a study of eligibility positions within the Department of Health and Human Services, and it is anticipated that those results will be presented to your Commission in the coming months.

In the meantime, we are requesting an extension of the current WOC for the employee to fill the need of a direct supervisor. The employee has been in the role of the Senior Client Services Program Specialist for over 1.5 years. She has the training and experience to immediately begin to function in a supervisory role.

_____ Information verified by HR

Updated 1/2017

Request for Work Out of Class (WOC) Pay

Key functions will include: (1) establishing and implementing state program eligibility regulations, (2) supervise and evaluate four program eligibility and clerical staff, (3) provide technical expertise in program eligibility and client billing issues. This position is 100% funded by outside allocations. Because this program provides direct services to the community, maintaining continuity at the program eligibility level is critical.

RECOMMENDATION

It is therefore recommended that the employee, Senior CSPS, be approved to extend their WOC pay as a Supervising CSPS effective August 3, 2017. Consistent with the guidelines presented under provisions for work out of class section in Chapter 3 of the County code, additional compensation for working out of class shall be no less than a minimum of five percent or exceed a maximum of fifteen (15) percent. The specific amount of the additional compensation will be determined by an analysis of the employee's current classification and the proposed work out of class classification and in no case will exceed the amount the employee would receive if promoted.

AUTHORITY

In line with the principle that an employee assigned higher level work or assigned to work in a position having discernibly higher job duties should receive higher pay, positions within the classified service may be eligible for WOC assignments. Individual employees may be certified by the Human Resources Department as being eligible for WOC pay when so assigned by the appointing authority or designee of that appointing authority (PCC sec. 3.08.510, PPEO and PCDSA MOUs).

PROVISIONS FOR WOC ASSIGNMENTS

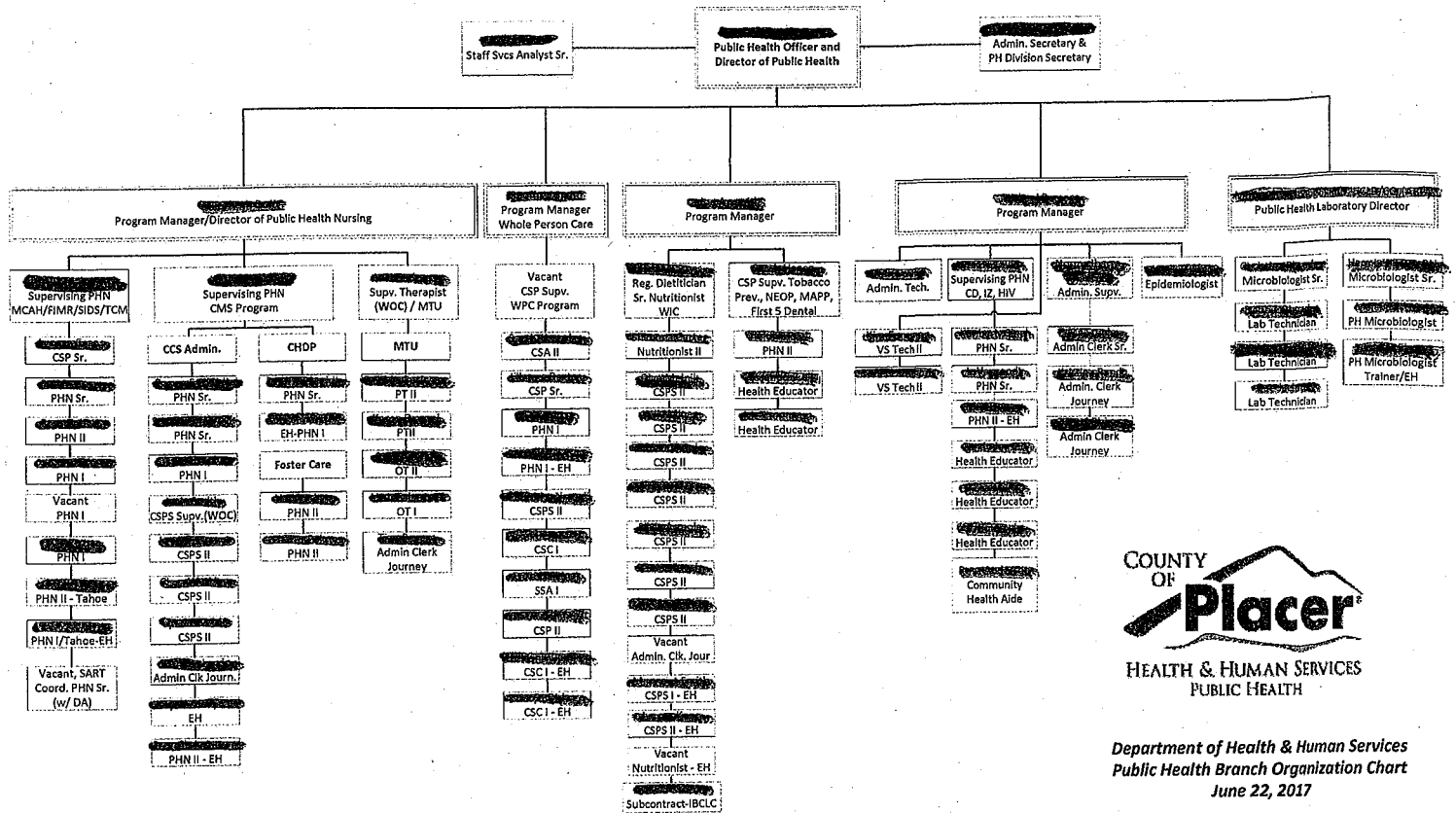
- In consideration for the temporary nature of the WOC assignment and the fact that appointment has not been made to the WOC classification, the following guidelines apply:
 - For evaluation purposes, employee is rated in his or her current classification.
 - Evaluation rating periods are not impacted by WOC assignments.
 - Employee will continue to be eligible for merit increases as outlined in PCC section 3.04.650.
 - Employee will continue to accrue seniority in his/her regular position/classification.
 - Employee will continue to receive the benefit package associated with his/her regular position/classification.
- WOC compensation will not be considered or paid for assignments for two workdays or less or for training purposes.
- The department must notify the Human Resources Department when the WOC employee has a leave of absence that exceeds ten (10) working days since this will result in ending WOC compensation. The department must then notify Human Resources and submit the appropriate paperwork prior to continuing the employee in a WOC assignment upon his/her return from leave.
- Additional compensation for WOC shall be no less than a minimum of five percent (5%) or exceed a maximum of fifteen percent (15%). Salary amount will be rounded down to the nearest whole percentage as determined by Human Resources.
- Additional compensation will be reported as pensionable special compensation if it meets the criteria defined by CalPERS.

_____ Information verified by HR

Updated 1/2017

Request for Work Out of Class (WOC) Pay

- While this WOC request is for a period of time not to exceed 180 days, it may end earlier as determined by the appointing authority.
- Employee is not to begin the WOC assignment until the Human Resources Department certifies the individual is eligible for WOC pay.
- The requesting department is responsible for sharing this WOC request and the provisions set forth for a WOC assignment with the employee.



Department of Health & Human Services
Public Health Branch Organization Chart
June 22, 2017



TO: Lori Walsh, Human Resources Director
FROM: Jeff Brown, Health and Human Services Director
DATE: July 10, 2017
SUBJECT: Request for Work Out of Class (WOC) Pay in **Recognition of Additional Duties**

ACTION REQUESTED

Employee ID: 01158760
Current Classification: Senior Physical Therapist
WOC Classification: In Recognition of Additional Duties
Initial WOC Effective Date: February 6, 2017
Requested Extension Eff. Date: August 3, 2017
Expiration Date of WOC: February 2, 2018

REASON FOR WOC

Fill Behind a: ☐ Leave of Absence ☐ Retirement ☐ Resignation ☐ WOC

Other: ☐ Peak Workload/Special Project ☒ Pending Reclassification / Reallocation
☐ Other:

PLAN TO END TEMPORARY WOC

☐ Request Submitted to Fill Vacancy ☐ Completion of Peak Workload / Special Project
☐ Return of Incumbent from LOA ☒ Other – Pending Reclassification/Reallocation

BACKGROUND

As a result of recent staffing changes and a review of the organizational structure within the Public Health Division of Health and Human Services, it became apparent that the addition of a first line supervisory position in the Medical Therapy Unit (MTU) was necessary. The Human Resources Department has partnered with Public Health staff to study positions in the MTU and is working on the development of a new supervisory classification, which will be presented to your Commission in the coming months.

In the meantime, in order to maintain a satisfactory level of case management and direct therapy services for families served by California Children's Services Medical Therapy Program, we are requesting a WOC in recognition of additional duties for the employee pending reclassification study of this position, and proposed creation of a Supervising Therapist classification.

_____ Information verified by HR

Updated 1/2017

Request for Work Out of Class (WOC) Pay

This employee has the training and experience to immediately begin to function in this WOC role. She has 20 years of experience as a Senior Physical Therapist. Key functions will include having the responsibility for the overall management and accountability of the Medical Therapy Program – including supervision and evaluation of therapy and clerical staff at the MTU. Because the MTU program provides direct services to the community, maintaining continuity at the therapy level is critical. There is not a current supervisor at this satellite location with physical/occupational therapy expertise, which is why Public Health requested a study of a new position. Public Health is waiting for the Human Resources Department to finalize their classification study so that a permanent change can be processed.

RECOMMENDATION

It is therefore recommended that this employee, Senior Physical Therapist, be approved to extend the current WOC pay in recognition of additional duties effective August 3, 2017. This WOC assignment will result in an approximate increase of 5%. Consistent with the guidelines presented under provisions for work out of class section in Chapter 3 of the County code, additional compensation for working out of class shall be no less than a minimum of five percent or exceed a maximum of fifteen (15) percent. The specific amount of the additional compensation will be determined by an analysis of the employee's current classification and the proposed work out of class classification and in no case will exceed the amount the employee would receive if promoted.

AUTHORITY

In line with the principle that an employee assigned higher level work or assigned to work in a position having discernibly higher job duties should receive higher pay, positions within the classified service may be eligible for WOC assignments. Individual employees may be certified by the Human Resources Department as being eligible for WOC pay when so assigned by the appointing authority or designee of that appointing authority (PCC sec. 3.08.510, PPEO and PCDSA MOUs).

PROVISIONS FOR WOC ASSIGNMENTS

- In consideration for the temporary nature of the WOC assignment and the fact that appointment has not been made to the WOC classification, the following guidelines apply:
 - For evaluation purposes, employee is rated in his or her current classification.
 - Evaluation rating periods are not impacted by WOC assignments.
 - Employee will continue to be eligible for merit increases as outlined in PCC section 3.04.650.
 - Employee will continue to accrue seniority in his/her regular position/classification.
 - Employee will continue to receive the benefit package associated with his/her regular position/classification.
- WOC compensation will not be considered or paid for assignments for two workdays or less or for training purposes.
- The department must notify the Human Resources Department when the WOC employee has a leave of absence that exceeds ten (10) working days since this will result in ending WOC compensation. The department must then notify Human Resources and submit the appropriate paperwork prior to continuing the employee in a WOC assignment upon his/her return from leave.

Request for Work Out of Class (WOC) Pay

- Additional compensation for WOC shall be no less than a minimum of five percent (5%) or exceed a maximum of fifteen percent (15%). Salary amount will be rounded down to the nearest whole percentage as determined by Human Resources.
- Additional compensation will be reported as pensionable special compensation if it meets the criteria defined by CalPERS.
- While this WOC request is for a period of time not to exceed 180 days, it may end earlier as determined by the appointing authority.
- Employee is not to begin the WOC assignment until the Human Resources Department certifies the individual is eligible for WOC pay.
- The requesting department is responsible for sharing this WOC request and the provisions set forth for a WOC assignment with the employee.



TO: Lori Walsh, Human Resources Director
FROM: Mary George, Director of Library Services
DATE: June 29, 2017
SUBJECT: Request for Work Out of Class (WOC) Pay

ACTION REQUESTED

Employee ID: 51234427
Current Classification: Library Assistant I
WOC Classification: Librarian I
Initial WOC Effective Date: 2-4-17, Pay Period 18
Requested Extension Eff. Date: July 2, 2017, Pay Period 2
Expiration Date of WOC: Not to exceed 180 days from effective date

REASON FOR WOC

Fill Behind a: ☐ Leave of Absence ☐ Retirement ☐ Resignation ☐ WOC

Other: ☐ Peak Workload/Special Project ☐ Pending Reclassification / Reallocation
X Other : Fill behind a transfer

PLAN TO END TEMPORARY WOC

X Request Submitted to Fill Vacancy ☐ Completion of Peak Workload / Special Project
☐ Return of Incumbent from LOA ☐ Other <Describe Here>

BACKGROUND

The Library is requesting a one-time extension of this Work Out of Class (WOC) assignment. The employee will be working out of class as a Librarian I. This position is the supervisor in charge of managing the operations of the Granite Bay Library. The Librarian vacancy occurred when the Granite Bay Senior Librarian was transferred to the Auburn Library based on business needs. The Library is currently in the middle of a Department wide classification study. Therefore, the Library plans to run a recruitment to fill the vacant Granite Bay Librarian position once the Classification Study is complete. The department plans to initiate a recruitment for a Librarian I/II in July 2017 with a goal to resolve this WOC assignment by September 2017.

The Granite Bay Library is a medium sized branch of the Placer County Library and therefore needs a Librarian to perform a variety of responsible library duties including functional and technical supervision over assigned library support staff and volunteers, facility operations, programming, and community outreach.

Request for Work Out of Class (WOC) Pay

The employee was hired in July 2014 as a Library Assistant at the Granite Bay Library. While in that position, she has completed her Master's degree of Library and Information Science at a school accredited by the American Library Association. She has also been the person in charge in the absence of the Senior Librarian. She has taken on many new tasks, including youth services programs, staff schedules, displays and work on system wide committees including the Summer Reading Program Committee. Her education and experience make her a good choice to be WOC as Librarian I in charge of the Granite Bay Library. She has done an excellent job in taking on the full range of duties associated with the operation of a medium branch library of the County's Library system including the children's library services for the Granite Bay Library.

RECOMMENDATION

It is therefore recommended that this employee be approved to receive WOC pay. Consistent with the guidelines presented under the Placer County Code section 3.08.510, and the PPEO and PCDSA MOUs, additional compensation for WOC pay shall be no less than a minimum of five percent (5%) or exceed a maximum of fifteen percent (15%). The specific amount of the additional compensation will be determined by an analysis of the employee's current classification and the proposed WOC classification and in no case will exceed the amount the employee would receive if promoted to the WOC classification.

AUTHORITY

In line with the principle that an employee assigned higher level work or assigned to work in a position having discernibly higher job duties should receive higher pay, positions within the classified service may be eligible for WOC assignments. Individual employees may be certified by the Human Resources Department as being eligible for WOC pay when so assigned by the appointing authority or designee of that appointing authority (PCC sec. 3.08.510, PPEO and PCDSA MOUs).

PROVISIONS FOR WOC ASSIGNMENTS

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• Request for Work Out of Class (WOC) Pay

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- The requesting department is responsible for sharing this WOC request and the provisions set forth for a WOC assignment with the employee.



PLACER COUNTY
HUMAN RESOURCES DEPARTMENT
145 Fulweiler Avenue, Suite 200
Auburn, California 95603-4578

CIVIL SERVICE COMMISSION
John Costa
Ron Le Doux
Don Nelson
Andrae Randolph
Rick Ward

Lori Walsh, Human Resources Director
Main Office: 530.889.4060
FAX: 530.886.4626
www.placer.ca.gov

MEMORANDUM

To: Civil Service Commission
From: Lori Walsh, Human Resources Director
By: Hedy Dehghan, Human Resources Manager
Date: July 10, 2017
Subject: Recommendations from the countywide fiscal classification study – Accountant/Auditor classification series

Recommendation

It is recommended that the Civil Service Commission approve:

1. The proposed revisions to the classification specifications for the following classifications:
 - a. Accountant Auditor I with classification specification updates and title change to Accountant I;
 - b. Accountant Auditor II with classification specification updates and title change to Accountant II;
 - c. Accountant Auditor, Senior with classification specification updates and title change to Accountant, Senior;
 - d. Accountant Auditor, Supervising with classification specification updates.
2. Creation of the following classifications:
 - a. Auditor I at the recommended salary grade of PROF 208 (\$4,606.62 - \$5,599.40 monthly);
 - b. Auditor II at the recommended salary grade of PROF 220 (\$5,332.86 – \$6,482.11 monthly);
 - c. Auditor, Senior at the recommended salary grade of PROF 232 (\$6,173.38 – \$7,503.79 monthly);
 - d. Accountant, Supervising at the recommended salary grade of MGMT 424 (\$6,403.39 - \$7,783.38 monthly).
3. The administrative placement of the incumbents into the recommended classifications as indicated on the allocation spreadsheet (Attachment A), pursuant to Placer County Code section 3.08.480.

Background

In response to a request from the Auditor-Controller's Office, the Human Resources department initiated a classification study of professional and management fiscal classifications utilized countywide. Historically the Auditor-Controller's Office has had difficulty recruiting individuals who possess professional auditing experience performing internal and external compliance, and financial and performance audits using the combined Accountant/Auditor classification. Additionally, the County wanted to ensure fiscal positions were working within the scope of their designated classification with equitable internal alignment. The goal of the study was to recognize the scope and level of responsibility of the studied positions; provide an improved basis for recruitment, assessment, and selection; and identify the appropriate classification structure and optimal organizational structure for fiscal classifications across the County. The 11 classifications (affecting 88 positions) included in the study were: Accountant Auditor I/II, Accountant Auditor Senior, Accountant Auditor Supervising, Managing Accountant Auditor, Administrative Services Officer, Senior Administrative Services Officer, Budget Analyst, Administrative and Fiscal Operations Manager, Finance and Budget Operations Manager, and Administrative Services Manager. At this time, the County is moving forward the results of the Accountant/Auditor-related classifications to include 57 positions in the following classifications: Accountant Auditor I/II, Accountant Auditor Senior, Accountant Auditor Supervising, and Managing Accountant Auditor. The results of the study pertaining to the other classifications will come before your Commission at a later date.

Basis for Recommendation

In August 2016, at the initiation of the classification study, the departments directly affected were invited to attend an orientation session to meet Koff & Associates, the consultant the County selected for the study. During the orientation session, department heads were advised of the purpose of the study, classification study process and associated timelines.

Over the next several months, the consultant and HR staff (in collaboration with executive and management staff from the participating departments) conducted the review and analysis of the designated fiscal positions using the following process:

- Multiple orientation sessions were held with affected employees (study participants) to discuss the classification study process, review the Position Inventory Questionnaires (PIQ's) and answer any questions as part of the project initiation and kick off.
- Study participants completed and submitted PIQ's which were reviewed by their immediate supervisors as well as management staff, then submitted to the consultant for review and analysis.
- Consultant staff met all study participants requesting an interview along with study participants whose PIQ required further clarification. Any follow up questions or issues regarding information contained in the PIQ's was discussed with study participants or their supervisors/managers.
- The consultant drafted classification concepts and reviewed them with HR staff. Following this review, draft classification specifications were developed and reviewed, with the

opportunity to provide updates/changes to language included in the classification specifications.

- Based on the information contained in the PIQ's and feedback received during the follow up meetings, the consultant submitted draft allocation recommendations to the HR Department and shared them with the department heads of each affected employee.
- Consultant staff and HR staff met with management personnel from each department to review allocation recommendations for their specific positions, which included an overview of the study results, classification concepts, and criteria considered in making allocation recommendations. Additional information was then provided by management staff regarding position requirements and follow up discussions were scheduled with consultant staff and managers, as requested, in order to clarify updated scope of work and respond to any follow up questions or concerns.
- HR discussed the final recommendations with the County Executive's Office and any associated budgetary/fiscal implications of these recommendations.
- All study participants were notified of the consultant's initial allocation recommendation and given a copy of the draft classification specification recommended for their position. Consistent with the requirements of the County code, each employee was given the opportunity to review and comment on the recommendations affecting their position.
- Overall, study participants acknowledged the study findings and recommendations. Three (3) study participants provided input to the draft classification specifications which was forwarded to the consultant for review and consideration. All appropriate changes were made.
- Based on information contained in the PIQ's, follow up information obtained from incumbents, supervisors, and managers, and information in the employee feedback forms, the final allocation notices and revised classification specifications were sent to all study participants. The final notices also included study participants' appeal rights. To date, no appeals have been submitted to HR.
- Study outcomes include the following:

# of employees with no changes/title changes only	45
# of employees with changes (see details below)	12
# of reclassifications resulting in promotion	9
# of reclassifications resulting in transfer	1
# of reclassifications resulting in demotion/y-rate	2

Results & Recommendations

The primary outcome of the fiscal classification study is the separation of the previously combined classification of Accountant Auditor into two separate career tracks: the Accountant series and the Auditor series. Each series has knowledge specific to their functional area of assignment which is distinct and not easily transferable. The ensuing recommendation is to retitle the Accountant/Auditor classification series to that of Accountant classification series with updates to reflect work conducted by professional-level accountants, and the recommendation to create a new Auditor classification series. The Auditor classification series is also a professional classification that performs internal and external compliance, financial and performance audits. This series depicts an experience level and skill set to reflect not only an understanding of accounting systems, but also in identifying a means to test their reliability, which is considered distinct and somewhat more complex than the skill set required to perform accounting work.

Overall, by modifying and revising the Accountant Auditor classification series, two separate classification series will result:

- ✓ In the Accountant classification series, the incumbents of this professional classification perform professional accounting work related to the maintenance of County accounting records and preparation of associated ledgers, journals and reports.
- ✓ In the Auditor classification series, incumbents of this professional classification perform complex professional audits of County departments, divisions, districts, external agencies and funds.

Additionally, the consultant made the distinction between technical and professional classes. Technical classifications capture work where the skills are typically acquired through vocational education and/or apprenticeships, certifications, and specialized, or on-the-job training. Problems are typically solved through knowledge of past practices and procedural guidelines, or through knowledge gained through work experience. Professional classifications include positions which require theoretical, conceptual and specialized financial accounting knowledge and expertise. Skills are typically acquired through education (relevant four-year degree), experience, specialized training and/or professional certification. Problems are typically solved through analysis and strategic thinking. This distinction was the premise of re-allocating positions appropriately throughout the course of the study.

Employee Review

As provided by the Placer County Code, Chapter 3, Section 3.08.520, each study participant has had an opportunity to review both the study's initial and final recommendation for his/her position and has been notified of the final recommendation and the action to move the request forward to the Civil Service Commission at today's date with the opportunity to appeal the recommendation to your Commission specifically for his/her position. No requests to appeal were received by the stated deadline.

July 10, 2017

Fiscal Classification Study – Accountant-Auditor Series

Page 5

Attached for your review and approval are the proposed re-allocation recommendations and classification specifications. The Human Resources Department, County department heads, County Executive's Office and the Business Agent for PPEO/Stationary Local 39, have reviewed and support the recommended changes and updates.

cc: County Department Heads
County Executive Office
Gary Winegar, Business Representative, IUOE Stationary Engineers Local 39

Attachments:

A. Allocation recommendations

B. Draft Classification Specifications

- Accountant I/II
- Accountant, Senior
- Accountant, Supervising
- Auditor I/II
- Auditor, Senior
- Accountant/Auditor, Supervising

C. Koff and Associates Report

Placer County Fiscal Classification Study (Accountant/Auditor Series) Allocation Spreadsheet

Position Number	Unit	Current HEID #	Original Title	Proposed Title	Action	Department
31669	PRO	51231910	Accountant Auditor II	Accountant II	Title Change	Administrative Services
34645	PRO	VACANT	Accountant Auditor Senior	Accountant, Senior	Title Change	Administrative Services
34331	PRO	51234525	Accountant Auditor Senior	Accountant, Senior	Title Change	Administrative Services
31288	PRO	51234778	Accountant Auditor Senior	Auditor, Senior	Reclassification and non-competitive promotion	Auditor Controller
31283	CON	51234981	Accountant Auditor II	Accountant II	Title Change	Auditor Controller
34641	MGT	51232128	Accountant Auditor Supervising	Accountant Auditor Supervising	No Change	Auditor Controller
34642	MGT	VACANT	Accountant Auditor Supervising	Accountant Auditor Supervising	No Change	Auditor Controller
31069	PRO	51234979	Accountant Auditor I	Accountant I	Title Change	Auditor Controller
31279	PRO	51233355	Accountant Auditor I	Accountant I	Title Change	Auditor Controller
31070	CON	51233366	Accountant Auditor I	Accountant I	Title Change	Auditor Controller
31280	PRO	VACANT	Accountant Auditor II	Accountant I/II	Title Change	Auditor Controller
31278	PRO	51233872	Accountant Auditor II	Accountant II	Title Change	Auditor Controller
34236	PRO	51235005	Accountant Auditor II	Accountant II	Title Change	Auditor Controller
34067	PRO	51235350	Accountant Auditor II	Accountant II	Title Change	Auditor Controller
31269	PRO	51233880	Accountant Auditor II	Accountant II	Title Change	Auditor Controller
31281	PRO	01201640	Accountant Auditor II	Accountant II	Title Change	Auditor Controller

Placer County Fiscal Classification Study (Accountant/Auditor Series) Allocation Spreadsheet

Position Number	Unit	Current EE ID #	Original Title	Proposed Title	Action	Department
31274	PRO	51233541	Accountant Auditor Senior	Accountant, Senior	Title Change	Auditor Controller
31261	PRO	51234118	Accountant Auditor Senior	Accountant, Senior	Title Change	Auditor Controller
31284	PRO	51234723	Accountant Auditor Senior	Accountant, Senior	Title Change	Auditor Controller
31291	CON	01153411	Accountant Auditor Senior	Accountant, Senior	Title Change	Auditor Controller
Z1071	PRO	51235539	Accountant Auditor Senior	Accountant, Senior	Title Change	Auditor Controller
31295	PRO	51234118	Accountant Auditor II	Auditor II	Reclassification / Competitive Promotion	Auditor Controller
31298	PRO	51235497	Accountant Auditor II	Auditor II	Reclassification / Competitive Promotion	Auditor Controller
31299	PRO	VACANT	Accountant Auditor II	Auditor I/II	Reclassification and competitive promotion	Auditor Controller
Z1065	PRO	51235010	Accountant Auditor Senior	Auditor, Senior	Reclassification and competitive promotion	Auditor Controller
31275	MGT	01199750	Managing Accountant Auditor	Managing Accountant Auditor	No Change	Auditor Controller
31302	MGT	01137442	Managing Accountant Auditor	Managing Accountant Auditor	No Change	Auditor Controller
31293	MGT	01199100	Managing Accountant Auditor	Managing Accountant Auditor	No Change	Auditor Controller
31293 (backfill)	MGT	51232103	Managing Accountant Auditor	Managing Accountant Auditor	No Change	Auditor Controller
34301	CON	01084720	Accountant Auditor Senior	Accountant, Senior	Title Change	CEO
34079	CON	01179180	Accountant Auditor II	Accountant I	Reclassification and y-rate	CEO
34220	PRO	01085510	Accountant Auditor II	Accountant I	Reclassification and y-rate	Community Development Resource Agency

Placer County Fiscal Classification Study (Accountant/Auditor Series) Allocation Spreadsheet

Position Number	Unit	Current EID #	Original Title	Proposed Title	Action	Department
31686	PRO	51232368	Accountant Auditor I	Accountant I	Title Change	DPW & Facilities
31684	PRO	51234470	Accountant Auditor I	Accountant I	Title Change	DPW & Facilities
31701	PRO	51231156	Accountant Auditor Senior	Accountant, Senior	Title Change	DPW & Facilities
32561	PRO	51234231	Accountant Auditor Senior	Accountant, Supervising	Reclassification and non-competitive promotion	Health and Human Services
34669	PRO	51234188	Accountant Auditor Senior	Accountant, Supervising	Reclassification and competitive promotion	Health and Human Services
33145	PRO	51235481	Accountant Auditor I	Accountant I	Title Change	Health and Human Services
33846	PRO	51235177	Accountant Auditor I	Accountant I	Title Change	Health and Human Services
30629	PRO	51234729	Accountant Auditor I	Accountant I	Title Change	Health and Human Services
33460	PRO	51234768	Accountant Auditor I	Accountant I	Title Change	Health and Human Services
30725	PRO	VACANT	Accountant Auditor II	Accountant I/II	Title Change	Health and Human Services
34757	PRO	VACANT	Accountant Auditor II	Accountant I/II	Title Change	Health and Human Services
33404	PRO	51232544	Accountant Auditor II	Accountant II	Title Change	Health and Human Services
34668	PRO	51233097	Accountant Auditor II	Accountant II	Title Change	Health and Human Services
32798	PRO	01151690	Accountant Auditor II	Accountant II	Title Change	Health and Human Services
34593	PRO	51234974	Accountant Auditor Senior	Accountant, Supervising	Reclassification and competitive promotion	Health and Human Services
34670	PRO	51235949	Accountant Auditor Senior	Accountant, Supervising	Reclassification and non-competitive promotion	Health and Human Services

Placer County Fiscal Classification Study (Accountant/Auditor Series) Allocation Spreadsheet

Position Number	Unit	Current EEID #	Original Title	Proposed Title	Action	Department
34671	PRO	51235278	Accountant Auditor Senior	Accountant, Supervising	Reclassification and competitive promotion	Health and Human Services
34560	CONF	VACANT	Accountant Auditor II	Accountant I/II	Title Change	Human Resources
30524	PRO	51234430	Accountant Auditor II	Accountant II	Title Change	Sheriff
34413	PRO	51234908	Accountant Auditor II	Accountant II	Title Change	Sheriff
30540	MGT	01101561	Senior Administrative Services Officer	Accountant, Supervising	Reclassification lateral transfer and y-rate	Sheriff
31324	PRO	01200370	Accountant Auditor Senior	Accountant, Senior	Title Change	Tax Collector
31329	PRO	51232215	Accountant Auditor I	Accountant I	Title Change	Tax Collector
34627	PRO	51234168	Accountant Auditor I	Accountant I	Title Change	Tax Collector
31319	PRO	51231217	Accountant Auditor II	Accountant II	Title Change	Tax Collector

PLACER COUNTY
September 1995
Revised January 2002
Revised September 2003
Revised June 2011
Revised July 2017

ACCOUNTANT-AUDITOR I/II

DEFINITION

To perform a variety of complex professional accounting and auditing work involving judgment and discretion in the analysis and application of accounting principles and practices in maintaining fiscal controls and records, preparing transactions, and developing financial and statistical reports, which depending on assignment may include any of the following: to review, analyze and maintain accounting and financial records; to develop and implement accounting and financial procedures and systems; to prepare complex financial reports; to monitor and report on budget trends, financial transactions, tax billings and collections, or accounts; to plan, coordinate and conduct audits of County departments, divisions, districts and funds; to provide recommendations for efficiencies and improvements; and perform related duties may supervise or provide technical direction to technical and clerical accounting and/or general clerical personnel.

DISTINGUISHING CHARACTERISTICS

Accountant-Auditor I: This is the entry level class in the Accountant-Auditor series. This class is distinguished from the journey level of Accountant-Auditor II by the performance of the more routine tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters allocated to the journey level. Since this class is typically used as a training class, employees may have only limited or no directly related work experience. Employees work under immediate supervision progressing to general supervision while learning job tasks.

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Accountant-Auditor II: This is the full journey level class within the Accountant-Auditor series. This class is distinguished from the entry level of Accountant-Auditor I by the assignment of the full range of duties of the class. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the entry level. This class is distinguished from the Senior-Accountant, Senior-Auditor in that the latter is a supervisory level with responsibility for a major accounting program or service area at the section or division level. This class is further distinguished from the Auditor I/II by the latter's regular performance of internal compliance, financial and performance audits performed in accordance with professional standards such as Institute of Internal Auditors.

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Accountant-Auditor I/ II (Page 2)

Generally Accepted Accounting Standards, and Generally Accepted Governmental Auditing Standards, including preparing audit reports with the issuance of an opinion.

SUPERVISION RECEIVED AND EXERCISED

ACCOUNTANT-AUDITOR I

Receives general supervision from assigned supervisory or management personnel.
May ~~Exercise~~ direct supervision over ~~Account Clerk~~ classifications or ~~general~~ technical and clerical personnel.

ACCOUNTANT-AUDITOR II

Receives direction from assigned supervisory or management personnel.
Typically ~~Exercise~~ direct supervision over ~~Account Clerk~~ classifications or ~~general~~ technical and clerical personnel. May ~~exercise~~ technical and functional supervision over ~~Accounting Technician~~ classification.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

Provide responsible professional and technical assistance in the administration, review and implementation of the County and/or departmental accounting programs and integrated accounting financial systems.
Participate in and assume responsibility for various departmental accounting functions including financial statements, general ledger, monthly statements, and special projects accounting; participate in special studies and reports.
Prepare a wide variety of detailed accounting, auditing, financial, statistical and narrative reports, including year-end, budgetary, monthly financial statements, cash flow, investments; assist in the preparation of the Comprehensive Annual Financial Report (CAFR) and custom reports, graphs, schedules, and other documents as needed for the County and other agencies.
Participate in the compilation and preparation of the annual budget, including assisting divisions with budget preparation, preparing and updating cash flow and cost projections and estimated revenues and expenditures, monitoring expenditures to ensure compliance with adopted budget, and assisting in publication of the budget.
Monitor and review expenditures, revenues, and budget allocations to determine financial status; analyze and reconcile expenditure and revenue accounts, including bond accounts; review and process appropriation transfer requests between accounts; reconcile bond statements and bank statements to the general ledger.
Prepare and review ledgers and journal entries; balance and maintain complex accounting records such as trusts, funds and claims; maintain and balance tax trust accounts.
Perform audit quality control procedures and review existing accounting procedures and internal control methods to ensure accounting documents are prepared accurately and in accordance with Generally Accepted Accounting Principles and County policies compliance with standard accounting principles and governmental codes, laws, rules and regulations.
Interpret, explain, and apply general and governmental accounting/auditing principles and procedures, laws, and regulations affecting the financial operations of the department assigned.

MINIMUM QUALIFICATIONS

ACCOUNTANT-AUDITOR I

Knowledge of:

- Generally accepted accounting principles, federal, state and local governmental accounting principles standards and other governmental accounting and auditing procedures.
- Cost accounting, fund accounting, enterprise accounting and financial reporting.
- Statutory laws, rules and regulations applicable to governmental accounting, auditing and finance, and fiscal operation related to areas of responsibility.
- Principles and practices of employee supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures.
- Pertinent local, State and Federal rules, regulations and laws.
- Organization and management practices as applied to the development, analysis, and evaluation of programs and operational needs of the assigned division.
- Modern office methods, procedures and equipment.
- Application and operation of computerized accounting systems and spreadsheets, using common accounting and spreadsheet software.
- General principles and practices of data processing and its applicability to accounting operations.
- Financial and operational auditing principles and techniques including audit work paper preparation, report writing and presentation.
- Principles and theories of internal control including indicators of fraud and risk.
- Principles and techniques of property tax billing and collections.
- Modern office practices, methods, and computer equipment and applications related to the work.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing the County in contacts with governmental agencies, community groups, and various business, professional, educational, regulatory, and legislative organizations.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff.

Ability to:

- On a continuous basis, know and understand all aspects of the job; intermittently prepare and analyze work papers, reports and special projects; identify and interpret technical and

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Accountant-Auditor I/ II (Page 5)

numerical information; observe and solve problems of operational and technical policy and procedures.

- On a continuous basis, sit at desk for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone and write or use a keyboard to communicate through written means; and lift light weight.
- Prepare and maintain the full range of standard accounting records and reports.
- ~~Conduct comprehensive financial, operational and compliance audits including analyzing data, fiscal and financial records to determine fraud and risk.~~
- Analyze complex data, identify discrepancies, develop accurate and concise summaries and tables and draw logical and appropriate conclusions; present technical information and data in an effective manner.
- Effectively represent the department and the County in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.
- Evaluate and develop improvements in operations, procedures, policies, or methods.
- Prepare clear and concise reports, correspondence, and other written materials.
- Use tact, initiative, prudence, and independent judgement within general policy, procedural, and legal guidelines.
- Operate accounting equipment, including calculators, personal computers and 10-key adding machine by touch.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- Communicate effectively in writing and speaking; conduct interviews.
- Establish and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.
- ~~Methods and practices of audit work paper preparation, audit report writing presentation, and make recommendations for improvement.~~
- Understand, interpret and apply federal, state and local laws, rules and regulations.
- Prioritize and manage multiple projects and meet deadlines.

Accountant-Auditor I

Experience and Training

- Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

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Accountant-Auditor I/ II (Page 6)

Experience:

No experience is required.

Training:

Equivalent to a Bachelor's degree from an accredited college or university with major course work in accounting, or a related field.

NOTE: Depending on the area of assignment, additional governmental accounting, auditing and finance experience which involves the application of State and local laws and/or governmental accounting standards may be substituted for the required degree on a year-for-year basis if:

- The experience was performing duties equivalent to those of an Accounting Technician in Placer County; and
- At least 18 units of college course work or related technical training in Business Administration, Public Administration, or a related field have been completed, including a minimum of 6 units in Accounting.

Experience used to substitute for the required degree cannot also be used to meet work experience requirements.

License or Certificate:

May need to possess a valid driver's license as required by the position and in accordance with the California Vehicle Code. Proof of adequate vehicle insurance and medical clearance may also be required.

ACCOUNTANT-AUDITOR II

In addition to the qualifications for the Accountant-Auditor I:

Knowledge of:

- Statutory laws, rules and regulations applicable to governmental accounting.

Ability to:

- Effectively plan, direct and supervise the work of others.

Experience and Training

- Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible accounting and/or audit experience performing duties similar to an Accountant-Auditor I with Placer County.

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Accountant-Auditor I/ II (Page 7)

Training:

Equivalent to a Bachelor's degree from an accredited college or university with major course work in accounting or a related field.

NOTE: Depending on the area of assignment, additional governmental accounting, auditing and finance experience which involves the application of State and local laws and/or governmental accounting standards may be substituted for the required degree on a year-for-year basis if:

- The experience was performing duties equivalent to those of an Accountant Technician I in Placer County; and
- At least 18 units of college course work or related technical training in Business Administration, Public Administration, or a related field have been completed, including a minimum of 6 units in Accounting.

Experience used to substitute for the required degree cannot also be used to meet work experience requirements.

License or Certificate:

May need to possess a valid driver's license as required by the position and in accordance with the California Vehicle Code. Proof of adequate vehicle insurance and medical clearance may also be required.

SENIOR ACCOUNTANT-AUDITOR, SENIOR

DEFINITION

To plan, organize, supervise and personally perform professional accounting and auditing work to ensure regulatory compliance with governmental accounting standards for a department, or major program area or section within an assigned department; to prepare a variety of complex accounting, statistical and narrative reports regarding financial transactions, grant programs, or trusts; to plan, coordinate and conduct audits for County departments, divisions and funds; to provide recommendations for efficiencies and improvements in accounting systems; manage the effective use of department resources to improve organizational productivity and customer service; and to provide highly responsible technical assistance to management staff in assigned department.

DISTINGUISHING CHARACTERISTICS

This is the advanced journey, supervisory level class in the Accountant-Auditor series. Positions at this level are distinguished from other classes within the series by the level of responsibility assumed, complexity of duties assigned, independence of action taken, and by the nature of external contacts and representation. the amount of time spent performing the duties and by the nature of the public contact made. Employees perform complex accounting and financial analyses, the most difficult and responsible types of duties assigned to classes within this series including performing and/or administering the most complex accounting and financial analyses, auditing functions and typically supervising an entire accounting function including professional accounting, technical with several subordinate accounting and clerical personnel. Employees at this level are required to be fully trained in all procedures related to assigned area of responsibility. This job class may also provide responsible professional accounting services to the County's investment activities. Successful performance of the work requires extensive professional background as well as skill in coordinating departmental work. This class is distinguished from the Accountant, Supervising in that the latter predominantly plans, coordinates, organizes, and supervises an assigned work unit(s) within a large, multi-unit division within departments that have Agency-wide financial accounting and reporting responsibility. This class is further distinguished from the Auditor series by the latter's regular performance of internal compliance, financial and performance audits performed in accordance with professional standards such as Institute of Internal Auditors, Generally Accepted Accounting Standards, and Generally Accepted Governmental Auditing Standards, including preparing audit reports with the issuance of an opinion.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from assigned supervisory or management personnel.

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Senior Accountant-, Senior Auditor (Page 2)

Exercises direct supervision over lower level professional, technical and clerical personnel. Exercises functional and technical supervision over assigned personnel.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

Provide supervision of professional, technical, and clerical staff in support of assigned department and program(s); provide leadership and direction to a team of professional and technical staff.

Plan, organize and supervise a major accounting or auditing program or section in the County, which requires extensive and varied knowledge of accounting, auditing, financial administration and laws or regulations applicable to the assigned area of responsibility.

Provide responsible professional and technical direction and assistance in the administration and implementation of the County and/or department accounting programs and integrated accounting and financial systems.

Provide supervision to professional, technical and clerical staff in support of assigned department and program(s); provide leadership and direction to a team of professional and technical staff.

Participate in the development and implementation of Develop, recommend and implement section goals, and objectives, policies and priorities for the unit within assigned department; assist in developing, implementing and explaining policies and procedures; recommend within departmental policy, appropriate service and staffing levels; recommend and administer policies and procedures.

Develop and supervise accounting, auditing and financial administration operations and systems; maintain budgetary controls; and prepare written correspondence.

Supervise directly and through subordinate professional personnel; train new employees; evaluate performance of individuals and programs; organize, assign, review and evaluate work products, methods and procedures.

Participate in the selection of staff; coordinate staff training; conduct performance evaluations, recommend discipline; implement discipline procedures as directed.

Design, implement, update and document accounting, auditing and financial management systems; establish procedures for work flow and format.

Perform audit procedures and review existing accounting procedures and internal control methods to ensure compliance with standard accounting principles and governmental codes, laws, rules and regulations and recommend corrective action if necessary.

Assume responsibility for various departmental accounting functions including financial statements, general ledger, monthly statements, and special project accounting; conduct and prepare special studies and reports.

Prepare and analyze a wide variety of complex periodic and special financial and statistical reports including but not limited to reports of investment transactions, status of investments, cash flow and earnings, tax billing, trial balances and statistical reports year-end reporting, budgetary reports, monthly financial statements, and assist in the preparation of the financial and custom reports, graphs, and schedules as needed.

Make recommendations to improve accounting procedures based on criteria, evidence and client processes, procedures and annual audit plan and to minimize the organizations audit risk.

Perform a variety of responsible auditing functions as required and as assigned.

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Senior Accountant-, Senior Auditor (Page 3)

~~Supervise and conduct annual inventories of assets.~~

~~Participate in the compilation and budget preparation and administration of the annual budget, including assisting divisions with budget preparation, preparing and updating cash flow and cost projections and estimated revenues and expenditures, monitoring expenditures to ensure compliance with adopted budget, and assisting in publication of the budget; prepare cost estimates for budget recommendations; submit justifications for personnel, supplies and equipment; monitor and control expenditures.~~
Monitor and review expenditures, revenues, and budget allocations to determine financial status.

Interpret, explain, and apply general and governmental accounting/auditing principles and procedures, laws, and regulations affecting the more complex financial operations of the department assigned.

Record and maintain appropriate controls for fixed assets, including vehicles; supervise annual inventory reconciliation including inspections and reconciliation of discrepancies.
Maintain and monitor the department grant funds and ensure compliance with rules and regulations governing the use and the accounting of each grant; compile and prepare financial and other data for claims; prepare grant applications.

Track Capital Improvement expenditures and allocate funds to the appropriate Capital Improvement account.

Assist in the coordination of audits; schedule, provide information and reporting for audits; ensure availability and accuracy of required reports and documentation.

Assist with investments, portfolio management, cash management, debt management, new financing, annexations and subdivisions, and revenue and expense projections.

Attend meetings, conferences, workshops, and training sessions, and review publications to remain current on principles, practices, and new developments in the field of accounting.

Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.

~~Conduct interviews, develop questionnaires, compose summary memos and work papers, narrative and written reports based on independent assessment of audit evidence.~~

~~Prepare and analyze financial statements, including but not limited to balance sheets, profit and loss statements, budget to actual schedules and statements of cash flow.~~

~~Represent assigned department/division/section to the public as well as other County employees and managers in a positive and productive manner.~~

~~Plan, coordinate, conduct and supervise financial operational and compliance audits including performing any procedures associated with conducting audits.~~

~~Perform related duties as assigned.~~

MINIMUM QUALIFICATIONS

Knowledge of:

- Generally accepted accounting principles, governmental accounting standards and other governmental accounting and auditing procedures.
- Cost accounting, fund accounting, enterprise accounting and financial reporting.

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Senior Accountant-, Senior Auditor (Page 4)

- Application and operation of computerized accounting systems and spreadsheets, using common accounting and spreadsheet software.
- Statutory laws, rules and regulations applicable to governmental accounting, auditing and finance, and programmatic areas of responsibility.
- Pertinent local, State and Federal rules, regulations and laws.
- Budget preparation, administration and control procedures.
- Organization and management practices as applied to the development, analysis, and evaluation of programs and operational needs of the assigned division.
- Application and operation of computerized accounting systems and spreadsheets, using common accounting and spreadsheet software.
- General principles and practices of data processing and its applicability to accounting operations.
- Principles and theories of internal control including indicators of fraud and risk.
- Modern office practices, procedures, methods and computer equipment and applications related to the work.
- Standard accepted principles and practices of motivation, team building and conflict resolution.
- Principles and practices of effective employee supervision, including work planning, assignment, review and evaluation, and the techniques, training of staff in work procedures and performance evaluations.
- Principles and practices used in planning, organizing and controlling work flow and processes.
- ~~Principles, practices, methods and techniques of financial auditing.~~
- ~~Principles and theories of internal control.~~
- ~~Common indicators of fraud and risk.~~
- ~~Methods and practices of audit work paper preparation, audit report writing and presentation.~~
- Tax billing principles and techniques.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively presenting the County in contacts with governmental agencies, community groups, and various business, professional, educational, regulatory, and legislative organizations.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff.

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible journey level professional accounting experience and/or ~~professional auditing experience~~ performing duties similar to an Accountant ~~Auditor~~ II with Placer County.

Training:

Equivalent to a Bachelor's degree from an accredited college or university with major course work in accounting or a related field.

NOTE: Depending on the area of assignment, additional governmental accounting, auditing and finance experience which involves the application of State and local laws and/or governmental accounting standards may be substituted for the required degree on a year-for-year basis if:

- The experience was performing duties equivalent to those of an Accounting Technician in Placer County; and
- At least 18 units of college course work or related technical training in Business Administration, Public Administration, or a related field have been completed, including a minimum of 6 units in Accounting.

Experience used to substitute for the required degree cannot also be used to meet work experience requirements.

License or Certificate:

May need to possess a valid driver's license as required by the position and in accordance with the California Vehicle Code. Proof of adequate vehicle insurance and medical clearance may also be required.

ACCOUNTANT, SUPERVISING

DEFINITION

To plan, coordinate, organize, and supervise an assigned work unit(s) within a large, multi-unit division within departments that have Agency-wide financial accounting and reporting responsibility; to assign, train, motivate, and evaluate the work of professional technical, and clerical staff; to design, modify, and organize assigned work processes and operational procedures to maximize assigned work unit's efficiencies and effectiveness; to perform the most complex professional and technical functions as necessary; and to function as a proactive and positive member of the departmental team.

DISTINGUISHING CHARACTERISTICS

The Accountant, Supervising job classification incorporates full supervisory responsibilities including oversight for a work unit. This job class is distinguished from the Accountant, Senior classification by the fact that the majority of duties performed by the former are supervisory and management tasks. This job class is distinguished from the Accountant Auditor, Supervising classification in that the latter has demonstrated expertise and knowledge required to provide county-wide oversight of a specialized area(s) such as financial accounting and/or government auditing processes.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from assigned management staff. Exercises general supervision over assigned professional, technical, and clerical personnel.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

Schedule, train, monitor, motivate, and supervise assigned professional, technical, and clerical staff; provide proactive and informational performance feedback to employees on an on-going basis; conduct performance evaluations in a timely and effective manner recommend and implement approved disciplinary actions.

Plan, organize, coordinate, and supervise assigned work unit(s) within a large, multi-unit division or a specialized stand-alone division; represent the assigned work unit(s) and staff to other divisions as well as other County departments and outside public and/or private organizations.

Monitor and evaluate the processes, procedures, and work flow of assigned work unit(s) on an on-going basis to maximize efficiencies and effectiveness; re-design and modify existing processes and procedures in a timely response to new or changing laws, regulations, codes, requirements, and ordinances, improved technologies, and/or clients'

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Accountant, Supervising (Page 2)

expectations and requests; create, establish, and implement new processes and procedures as necessary.

Perform the more difficult and complex financial accounting, reporting, and/or review tasks assigned to the designated work unit(s) utilizing skill sets and in-depth knowledge of governmental accounting, the Agency's or department's funding structures, GAAP, GASB, etc.; perform a variety of required functions and duties when work unit(s) is short staffed and/or deadlines demand.

Establish, implement and administer internal accounting controls; ensure compliance with financial reporting requirements and updates.

Participate in the recruitment and selection of designated staff; coordinate and participate in the interview process.

Act as primary resource and main point of contact regarding the functions and responsibilities of assigned work unit(s) and staff; investigate complaints and recommend corrective and/or proactive action to be taken as necessary.

Manage and conduct project or program management and planning activities; lead and guide teams in the execution of accounting services; develop work plans consisting of mission, objectives, scope of work, budget, schedules, and baseline requirements; identify critical issues and recommend solutions to manage risks.

Conduct a variety of organizational and financial studies, investigations, and operational studies and analyses; recommend modifications to financial services programs, policies, and procedures, as appropriate.

Participate in the budget preparation process; prepare cost estimates for assigned work unit(s); submit justifications with documentation for budget requests related to staff, equipment, and supplies; monitor and control assigned budget on an on-going basis.

Attend and participate in professional group meetings; stay abreast of new trends, laws, regulations, and innovations in the related field of accounting services; research emerging products and enhancements including integrated systems solutions and their applicability to Agency needs.

Build and maintain positive working relationships with co-workers, management, other County employees, other organizations and agencies, and the public using principles of good customer service.

Perform related duties as required.

MINIMUM QUALIFICATIONS

Knowledge of:

- Generally accepted accounting principles, governmental accounting standards and other pertinent governmental accounting and auditing procedures.
- Cost accounting, fund accounting and financial reporting methods and procedures.
- Application and operation of designated computerized accounting systems and spreadsheets, utilizing designated accounting and spreadsheet software.
- Statutory laws, rules and regulations applicable to governmental accounting, auditing and finance within designated programmatic areas of responsibility.

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Accountant, Supervising (Page 3)

- Pertinent local, state, and federal rules, regulations and laws.
- Budget preparation, administration and control procedures.
- Principles and practices of motivation, team building and conflict resolution.
- Modern office procedures, methods and computer equipment.
- Principles of effective supervision techniques, training methods, and effective performance management.
- Principles and practices utilized in planning, organizing and controlling work flow and processes.
- Principles, practices, methods and techniques of financial auditing.
- Principles and theories of internal control.
- Common indicators of fraud and risk.

Ability to:

- Organize, implement and direct designated accounting, auditing, and/or financial reporting operations and/or activities.
- On a continuous basis, know and understand all aspects of the assigned position; intermittently analyze work papers, reports and special projects; identify and interpret technical and numerical information; observe and solve problems of operational and technical policy and procedures.
- Analyze problems, identify alternative solutions, project consequences of proposed actions and implement approved solutions in support of stated goals.
- Design and implement accounting and financial management systems.
- Analyze and evaluate accounting systems and financial programs; design improvements and controls for assigned operations; and assess overall effectiveness of programmatic responsibilities.
- Interpret and apply legal, regulatory and administrative controls to accounting functions and financial management systems.
- Develop and monitor an assigned program budget in an effective manner.
- Develop and recommend policies and procedures related to assigned operations.
- Communicate clearly and concisely in both oral and written forms.
- Work with various cultural and ethnic groups and individuals in a tactful and effective manner.
- Train, direct, supervise and evaluate the work of professional, technical, and clerical staff.
- Perform the most complex accounting work of the assigned work unit(s) in an effective and timely manner.

- Establish and maintain effective working relationships with those contacted while performing assigned duties.

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two (2) years of progressively responsible advanced journey level professional experience performing duties similar to an Accountant, Senior with Placer County, one year of which must have been performing full supervisory functions in a similar professional environment.

Training:

Equivalent to a Bachelor's degree from an accredited college or university with major course work in accounting or a related field.

License or Certificate:

May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

AUDITOR I/II

DEFINITION

To perform a variety of complex professional audits of County departments, divisions, districts, external agencies, and funds in accordance with professional standards such as Institute of Internal Auditors, Generally Accepted Accounting Standards, and Generally Accepted Governmental Auditing Standards, which depending on the assignment include any of the following: financial, operational, performance, and/or compliance audits; review, analyze and audit internal and management controls and systems, prepare complex audit reports including the issuance of an opinion; provide recommendations for efficiencies and improvements; and supervise assigned personnel.

DISTINGUISHING CHARACTERISTICS

Auditor I: This is the entry level class in the Auditor series. This class is distinguished from the journey level of Auditor II by the performance of the more routine tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters allocated to the journey level. Since this class is typically used as a training class, employees may have only limited or no directly related work experience. Employees work under immediate supervision progressing to general supervision while learning job tasks.

Auditor II: This is the full journey-level class within the Auditor series. This class is distinguished from the entry level of Auditor I by the assignment of the full range of duties of the class. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the entry level. Incumbents may assume specialized responsibility. This class is distinguished from the Auditor, Senior in that the latter is a supervisory level with responsibility for a major audit program or service area at the section or division level.

SUPERVISION RECEIVED AND EXERCISED

AUDITOR I

Receives direct supervision from assigned supervisory or management personnel. Provides technical and functional direction over lower level personnel as needed. May exercise direct supervision over technical and clerical personnel.

AUDITOR II

Receives general direction from assigned supervisory or management personnel. Provides technical and functional direction over lower level personnel as needed. May exercise direct supervision over technical and clerical personnel.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

Perform financial, operational, performance, and compliance audits by preparing audit program including scope, objectives, and plans; identifying risk areas and conducting risk assessments; conducting interviews; researching and analyzing documentation, reports, processes, policies, procedures, and various data; preparing reports and documenting process, findings, and recommendations for improvement.

Examine aspects of organization operations and internal and management controls, review organization policies and procedures, appraise performance and accomplishments in the execution of County plans and objectives, and evaluate the effectiveness of operations in terms of the resources available to the departments, divisions, districts, and funds audited.

Develop, review, and implement auditing procedures and systems.

Assist in making recommendations to improve financial, operational, performance, and/or compliance procedures based on criteria, evidence, and client processes, procedures, and annual audit plan and to minimize audit risk.

Conduct the County's auditing functions with integrity, independence, and efficiency and in compliance with County standards and state and federal rules and regulations.

Assist in the development, implementation, and maintenance of County audit policies, procedures, and standards by assessing current audit processes; assisting in identifying controls or measures that are operationally or economically deficient; developing and recommending improvements; assisting in providing management with independent evaluations of management practices; communicating revisions to management; and implementing modifications and improvements.

Assist independent auditors in their annual review by preparing data, facilitating the provision of related information, and responding to requests in a timely and efficient fashion.

Supervise, assign, and review the work of assigned staff; train and evaluates employees.

Keep complete and accurate audit records for a department.

Build and maintain positive working relationships with co-workers, other County employees, and the public using principles of good customer service.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

AUDITOR I

Knowledge of:

- Financial, operational, performance, and compliance auditing procedures including Generally Accepted Auditing Standards.

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- Generally accepted accounting principles, governmental accounting standards and other governmental accounting procedures.
- Cost accounting, fund accounting, enterprise accounting, and financial reporting.
- Principles and theories of internal control including indicators of fraud and risk.
- Applicable federal, state, and local laws, regulations, ordinances, and organizational policies and procedures related to audits.
- Methods and practices of audit work paper preparation, audit report writing presentation, and making recommendations for improvement.
- Practices of researching issues, evaluating alternatives, making sound recommendations, and preparing and presenting effective reports.
- Modern office practices, methods, computer equipment, and applications related to the work.

Ability to:

- On a continuous basis, know and understand all aspects of the job; intermittently prepare and analyze work papers, reports and special projects; identify and interpret technical and numerical information; observe and solve problems of operational and technical policy and procedures.
- On a continuous basis, sit at desk for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone and write or use a keyboard to communicate through written means; and lift light weight.
- Prepare and maintain audit records and reports.
- Conduct comprehensive financial, operational, performance, and compliance audits including establishing audit scope and objectives, analyzing data, determining fraud and risk, and developing recommendations for corrections.
- Analyze complex data, identify discrepancies, develop accurate and concise summaries and tables, and draw logical and appropriate conclusions.
- Understand, interpret, and apply federal, state, and local laws, rules, and regulations.
- Effectively represent the department and the County in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.
- Evaluate and develop improvements in operations, procedures, policies, or methods.
- Prioritize and manage multiple projects and meet deadlines.
- Operate office equipment and computer applications related to the work.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Communicate effectively in writing and speaking; conduct interviews.

- Establish and maintain positive working relationships with co-workers, other County employees, and the public using principles of good customer service.

Auditor I

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

One year of responsible accounting experience performing duties similar to an Accountant I with Placer County.

Training:

Equivalent to a Bachelor's degree from an accredited college or university with major coursework in business or public administration, finance, accounting, or a related field.

AUDITOR II

In addition to the qualifications for the Auditor I:

Knowledge of:

- Administrative principles and practices, including goal setting, audit program development, implementation, and evaluation, and project management.

Ability to:

- Understand the organization and operation of the County and of outside agencies as necessary to assume assigned responsibilities.
- Evaluate and prepare recommendations for changes to internal and management controls, systems, policies, and procedures and in compliance with regulations and auditing standards.

Experience and Training

- Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible audit experience performing duties similar to an Auditor I with Placer County.

Training:

Equivalent to a Bachelor's degree from an accredited college or university with major course work in business or public administration, finance, accounting, or a related field.

License or Certificate:

May need to possess a valid driver's license as required by the position and in accordance with the California Vehicle Code. Proof of adequate vehicle insurance and medical clearance may also be required.

AUDITOR, SENIOR

DEFINITION

To plan, organize, supervise, and personally perform a variety of complex professional audits of County departments, divisions, districts, external agencies, and funds in accordance with professional standards such as Institute of Internal Auditors, Generally Accepted Accounting Standards, and Generally Accepted Governmental Auditing Standards, which depending on the assignment include any of the following: financial, operational, performance, and/or compliance audits; review, analyze and audit internal and management controls and systems, prepare complex audit reports including the issuance of an opinion; provide recommendations for efficiencies and improvements; and provide highly responsible technical assistance to management staff in assigned department.

DISTINGUISHING CHARACTERISTICS

This is the advanced journey level class in the Auditor series. Positions at this level are distinguished from other classes within the series by the level of responsibility assumed, complexity of duties assigned, independence of action taken, and by the nature of external contacts and representation. Employees perform the most difficult and responsible types of duties assigned to classes within this series including oversight and review of auditing functions and supervising audit professional staff. Employees at this level are required to be fully trained in all procedures related to assigned area of responsibility. This class is distinguished from the Supervising Accountant Auditor in that the latter plans, coordinates, organizes, and supervises an assigned work unit(s) within a large, multi-unit division of the Auditor Controller's Office.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from assigned supervisory or management personnel.
Exercises direct supervision over professional, technical, and clerical personnel.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

Plan, organize, and supervise a major auditing program or section in the County, which requires extensive and varied knowledge of auditing laws, rules, and regulations applicable to the assigned area of responsibility.

Provide leadership and supervision to professional, technical, and clerical staff in support of assigned department and program(s), either directly and through subordinate staff; coordinate staff training; participate in selection of staff; conduct performance

evaluations; recommend and implement discipline procedures as appropriate; organize, assign, review, and evaluate work products, methods, and procedures.

Develop, recommend, and implement section goals and objectives within assigned department; assist in developing, implementing, and explaining policies and procedures.

Develop and supervise financial, operational, performance, and compliance audits including preparing audit program including scope, objectives, and plans; identifying risk areas and conducting risk assessments; conducting interviews; researching and analyzing documentation, reports, processes, policies, procedures, and various data; preparing reports and documenting process, findings, and recommendations for improvement.

Design, implement, update, and document auditing procedures and systems.

Develop, implement, and maintain County audit policies, procedures, and standards by assessing current audit processes; identifying controls or measures that are operationally or economically deficient; developing and recommending improvements; providing management with independent evaluations of management practices; communicating revisions to management; and implementing modifications and improvements.

Examine organization operations and internal and management controls, review organization policies and procedures, appraise performance and accomplishments in the execution of County plans and objectives, and evaluate the effectiveness of operations in terms of the resources available to the departments, divisions, districts, external agencies, and funds audited.

Develop recommendations to improve financial, operational, performance, compliance procedures and/or to minimize audit risk based on criteria, evidence, and client processes, procedures, and annual audit plan.

Ensure that the County's auditing functions are conducted with integrity, independence, and efficiency and in compliance with County standards and state and federal rules and regulations.

Coordinate independent audits; facilitate the provision of related information and responds to requests in a timely and efficient fashion.

Build and maintain positive working relationships with co-workers, other County employees, and the public using principles of good customer service.

Represent assigned department and the County to governmental agencies, community groups, various business, professional, educational, and regulatory organizations, and the public, as well as to County staff and management in a positive and productive manner.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

- Principles and practices of employee supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures.
- Standard accepted principles and practices of motivation, team building, and conflict resolution.
- Administrative principles and practices, including goal setting and project management.

PLACER COUNTY
Auditor, Senior (Page 3)

- Organizational and management practices as applied to the analysis, evaluation, development, and implementation of programs, policies, and procedures.
- Financial, operational, performance, and compliance auditing procedures including Generally Accepted Auditing Standards.
- Methods and practices related to audit program development, implementation, and evaluation.
- Generally accepted accounting principles, governmental accounting standards and other governmental accounting procedures.
- Cost accounting, fund accounting, enterprise accounting, and financial reporting.
- Principles and theories of internal control including indicators of fraud and risk.
- Applicable federal, state, and local laws, regulations, ordinances, and organizational policies and procedures related to audits.
- Practices of researching issues, evaluating alternatives, making sound recommendations, and preparing and presenting effective reports.
- Modern office practices, methods, computer equipment, and applications related to the work.
- Techniques for effectively representing the County in contacts with governmental agencies, community groups, various business, professional, educational, and regulatory organizations, and the public.

Ability to:

- Analyze work papers, reports and special projects; identify and interpret technical and numerical information; observe and solve problems of operational and technical policy and procedures.
- On a continuous basis, know and understand all aspects of the job; intermittently analyze work papers, reports and special projects; identify and interpret technical and numerical information; observe and solve problems of operational and technical policy and procedures.
- On a continuous basis, sit at desk for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone and write or use a keyboard to communicate through written means; and lift light weight.
- Research, interpret, and apply legal, regulatory, or administrative laws, rules, regulations, standards and principles.
- Organize, implement, and direct auditing and reporting operations and/or activities.

PLACER COUNTY
Auditor, Senior (Page 4)

- Design and implement financial, operational, performance, and/or compliance audit programs; assess overall effectiveness of assigned programs; and develop and implement improvements and controls for assigned programs.
- Train, direct, supervise and evaluate professional and clerical subordinates.
- Understand the organization and operation of the County and of outside agencies as necessary to assume assigned responsibilities.
- Analyze and evaluate internal and management controls, systems, policies, and procedures for compliance with regulations and auditing standards.
- Develop and recommend policies and procedures related to assigned operations.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- Prepare comprehensive, clear, concise, and highly complex reports.
- Communicate clearly and concisely, both orally and in writing.
- Effectively represent the department and the County in meetings with other staff, outside agencies, community groups, and the public.
- Establish and maintain positive working relationships with co-workers, other County employees, and the public using principles of good customer service.

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible journey level professional financial, operational, or compliance auditing experience performing duties similar to an Auditor II with Placer County.

Training:

Equivalent to a Bachelor's degree from an accredited college or university with major course work in accounting or a related field.

License or Certificate:

May need to possess a valid driver's license as required by the position and in accordance with the California Vehicle Code. Proof of adequate vehicle insurance and medical clearance may also be required.

SUPERVISING ACCOUNTANT-AUDITOR, SUPERVISING**DEFINITION**

To plan, coordinate, organize, and supervise an assigned work unit(s) within a large, multi-unit division of the Auditor Controller's Office; to assign, train, motivate, and evaluate the work of professional and technical staff; to design, modify, and organize assigned work processes and operational procedures to maximize assigned work unit's efficiencies and effectiveness; to perform the most complex professional and technical functions as necessary; and to function as a proactive and positive member of the departmental team.

DISTINGUISHING CHARACTERISTICS

The ~~Supervising~~-Accountant Auditor, Supervising job class is a specialized classification that recognizes full supervisory responsibilities including planning, assigning and evaluating the work of subordinates. This job class is distinguished from the Accountant, Senior and Auditor, Senior classification by the fact that the majority of duties performed by the former are supervisory and management tasks. This job class is distinguished from the Accountant, Supervising by the level of demonstrated expertise and knowledge required to provide county-wide oversight of a specialized area(s) such as financial accounting and/or government auditing processes. This class is further distinguished from the Managing-Accountant Auditor, Managing classification by the latter's over-all departmental management responsibilities. ~~Positions allocated to the Supervising Accountant Auditor classification are further distinguished by the level of demonstrated expertise and knowledge required in a specialized area(s) such as financial accounting and/or government auditing processes.~~

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from assigned management staff to include the Auditor Controller and the Assistant Auditor Controller.

Exercises direct and full supervision over assigned professional, technical, and clerical personnel.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

Schedule, train, monitor, motivate, and supervise assigned professional, technical, and clerical staff; provide proactive and informational performance feedback to employees on an on-going basis; conduct performance evaluations in a timely and effective manner.

PLACER COUNTY

Supervising Accountant-Auditor, Supervising (Page 2)

Plan, organize, coordinate, and supervise an assigned work unit(s) within a large, multi-unit division or a specialized stand-alone division within the Auditor Controller's Office; represent the assigned work unit(s) and staff to other divisions within the Office as well as other County departments and outside public and/or private organizations.

Monitor and evaluate the processes, procedures, and work flow of assigned work unit(s) on an on-going basis to maximize efficiencies and effectiveness; re-design and modify existing processes and procedures in a timely response to new or changing laws, regulations, codes, and ordinances, improved technologies, and/or clients' expectations and requests; create, establish, and implement new processes and procedures as necessary. Perform the more difficult and complex financial accounting, reporting, and/or auditing tasks assigned to the designated work unit(s) utilizing specialized skill sets and in-depth knowledge of governmental accounting, the County's funding structures, GAAP, GASB, etc; perform a variety of required functions and duties when work unit(s) is short staffed and/or deadlines demand.

Participate in the recruitment and selection of designated staff; coordinate and participate in the interview process; provide support and monitor performance.

Maintain and update performance documentation for all assigned staff on an on-going basis; recommend disciplinary actions as necessary and as appropriate; provide oral and written warnings in accordance with accepted policy and personnel rules; implement approved disciplinary actions in a timely and professional manner upon request.

Act as primary resource and main point of contact regarding the functions and responsibilities of assigned work unit(s) and staff; provide proactive and positive customer service; respond to all inquiries, questions, and requests in a timely and customer oriented manner; investigate complaints and recommend corrective and/or proactive action to be taken as necessary.

Participate in the budget preparation process; prepare cost estimates for assigned work unit(s); submit justifications with documentation for budget requests related to staff, equipment, and supplies; monitor and control assigned budget on an on-going basis.

Build and maintain positive working relationships with co-workers, management, other County employees, other organizations and agencies, and the public using principles of good customer service.

Perform related duties as required.

MINIMUM QUALIFICATIONS

Knowledge of:

- Generally accepted accounting principles, governmental accounting standards and other pertinent governmental accounting and auditing procedures.
- Cost accounting, fund accounting and financial reporting methods and procedures.
- Application and operation of designated computerized accounting systems and spreadsheets, utilizing designated accounting and spreadsheet software.
- Statutory laws, rules and regulations applicable to governmental accounting, auditing and finance within designated programmatic areas of responsibility.

- Pertinent local, state, and federal rules, regulations and laws.
- Budget preparation, administration and control procedures.
- Principles and practices of motivation, team building and conflict resolution.
- Modern office procedures, methods and computer equipment.
- Principles of effective supervision techniques, training methods, and effective performance management.
- Principles and practices utilized in planning, organizing and controlling work flow and processes.
- Principles, practices, methods and techniques of financial auditing.
- Principles and theories of internal control.
- Common indicators of fraud and risk.

Ability to:

- Organize, implement and direct designated accounting, auditing, and/or financial reporting operations and/or activities.
- On a continuous basis, know and understand all aspects of the assigned position; intermittently analyze work papers, reports and special projects; identify and interpret technical and numerical information; observe and solve problems of operational and technical policy and procedures.
- Analyze problems, identify alternative solutions, project consequences of proposed actions and implement approved solutions in support of stated goals.
- Design and implement accounting and financial management systems.
- Analyze and evaluate accounting systems and financial programs; design improvements and controls for assigned operations; and assess overall effectiveness of programmatic responsibilities.
- Interpret and apply legal, regulatory and administrative controls to accounting functions and financial management systems.
- Develop and monitor an assigned program budget in an effective manner.
- Develop and recommend policies and procedures related to assigned operations.
- Communicate clearly and concisely in both oral and written forms.
- Work with various cultural and ethnic groups and individuals in a tactful and effective manner.
- Train, direct, supervise and evaluate the work of professional, technical, and clerical staff.

PLACER COUNTY

Supervising Accountant-Auditor, Supervising (Page 4)

- Perform the most complex accounting work of the assigned work unit(s) in an effective and timely manner.
- Establish and maintain effective working relationships with those contacted in the course of performing assigned duties.

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Four (4) years of progressively responsible journey level professional experience performing duties similar to an Accountant II or Auditor II with Placer County, one year of which must have been performing full supervisory functions in a similar professional environment;

OR

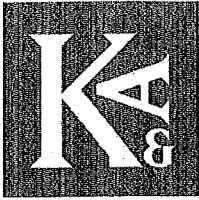
Two (2) years of progressively responsible advanced journey level professional experience performing duties similar to a ~~Senior Accountant~~, Senior or Auditor, Senior with Placer County.

Training:

Equivalent to a Bachelor's degree from an accredited college or university with major course work in accounting or a related field.

License or Certificate:

May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.



Submittal Date: 06/30/17

Classification Study Final Report – Accounting and Auditing Classification Series

County of Placer

Submitted By:

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■ Koff & Associates

Human Resources Consulting Since 1984

June 30, 2017

Ms. Lori Walsh
Human Resources Director
County of Placer
145 Fulweiler Avenue, Suite 200
Auburn, CA 95603

Dear Ms. Walsh:

Koff & Associates is pleased to present the final report for the classification study of the Accountant- Auditor classification series at the County of Placer. This report documents the classification study process, provides recommendations for allocation of individual positions currently classified as Accountant Auditor I, II, Senior, Supervising and Managing and revisions to current and new class specifications.

This report incorporates a summary of the classification study's multi-step process. The classification study process included completion of written Position Description Questionnaires, interviews with employees, supervisors and managers, and employee review and comments in the form of draft class descriptions, and class allocation recommendations.

We would like to thank you, Hedy Dehghan and other County staff for your assistance and cooperation without which this study could not have been brought to its successful completion.

We will be glad to answer any questions or clarify any points as you are implementing the findings and recommendations. It was a pleasure working with the County of Placer and we look forward to future opportunities to provide you with professional assistance.

Very truly yours,

Katie Kaneko
President



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APPENDICES

- Appendix I: Recommended Position Allocation
- Appendix II: Recommended Classification Descriptions



BACKGROUND

In July 2016, Koff & Associates (K&A) conducted a classification study for the Accountant Auditor classification series at the County of Placer. The goals and objectives of the study were to:

- Recommend appropriate classifications for the studied positions that:
 - Recognize the scope and level of responsibility of the studied positions;
 - Provide an improved basis for recruitment, assessment, and selection; and
 - Provide a basis for establishing a compensation level that is commensurate with the nature of the work performed;

A classification study may be performed for various reasons including the appearance that a position is performing different duties than are currently outlined for the classification; has experienced gradual changes in duties performed; has undergone changes in organizational relationships; or when a department, a division, an employee, or the County wants to ensure more equitable internal alignment. In this case, there was concern by management that the duties and minimum qualifications of some positions were distinct enough to warrant the creation of additional levels and classifications.

There were 57 positions studied within the series:

- 11 classified as Accountant Auditor I;
- 22 classified as Accountant Auditor II;
- 17 classified as Accountant Auditor Senior;
- 2 classified as Accountant Auditor, Supervising
- 4 classified as Accountant Auditor, Managing
- 1 classified as Senior Administrative Services Officer

CLASSIFICATION STUDY METHODOLOGY

The following provides an overview of the classification study methodology.

- A. Orientation Meetings with Employees and Distribution of Position Description Questionnaire (PDQ)
 - K&A facilitated orientation meetings for all study participants and managers and distributed the PDQ, began the educational process that continued throughout the study, and discussed the importance of employees' involvement and the elements not part of the study.
- B. PDQ Completion & Review



- Employees completed PDQ forms and their supervisors and management reviewed, commented, and signed off on the forms.
 - K&A received and reviewed the PDQ forms.
- C. Employee and Supervisor Interviews
- Interviews were scheduled with employees, supervisors, and management.
 - Employees were interviewed to clarify and supplement the PDQ data.
 - Supervisors and management were interviewed to clarify and/or confirm the information collected in the staff interviews and to respond to potential perception differences regarding roles, tasks, and scope.
- D. Classification Concept and Position Allocation Development
- Following the analysis of the classification information gathered, classification concepts and position allocations were developed and recommended.
 - Classification concept recommendations may include expanding or collapsing class series and/or separating or combining classifications assigned to different functional areas; identifying and defining classification levels and career ladders; and updating established titling guidelines for the studied classifications for appropriate and consistent titling.
 - Specific position allocation recommendations include specifying current and proposed classification title and impact of the recommendations (reclassification, title change, or no change [i.e., update of classification description format and/or content only]).
 - Recommendations for title change and reclassification are made to more clearly reflect the level and scope being performed, as well as establish consistency with the labor market and industry standards.
 - Appendix I contains the classification recommendations for each position studied.
 - Meetings were held with management to communicate draft class concepts and receive feedback.
 - Resolution of issues, wherever possible, including additional contacts with employees and management to obtain details and gain clarification.
- E. Draft Class Description Development
- Within the existing County format, new and/or updated class descriptions were developed for each proposed classification, updating duties, responsibilities, and minimum qualifications of each class specification.
- F. Class Description Review and Update



- Draft copies of the new classification descriptions were submitted to employees and management to provide comments and concerns regarding any modifications and to ensure that no facts were overlooked and that the recommendations were fair and consistent.
- Allocation recommendations and/or classification descriptions were revised, as appropriate, based on employee and management feedback. The final classification descriptions are included in Appendix II.

G. Final Report Development

- The Final Report was developed and contains: goals and objectives, classification methodology and recommendations; classification concepts; and classification descriptions.

CLASSIFICATION CONCEPTS DEFINED

New Classification Concepts were developed as part of this study process which defines the recommended classification series. It is commonly found that three (3) categories of positions generally exist below supervisory/management levels and can be described as Operational, Technical, and Professional. Within each of these categories various job levels can exist, depending on the needs of the organization. One key aspect of this study was to define key differences and similarities between positions performing work in line with the Accounting Technician classification (Technical Category), and Accountant series (Professional Category).

The Technical classifications capture work where the skills are typically acquired through vocational education and/or apprenticeships, certifications, specialized, or on-the-job training. Problems are typically solved through knowledge of past practices and procedural guidelines, or through knowledge gained through work experience. Positions assigned to the technical classifications apply a defined skill set to the work, while developing some specialized skills in procedures, operations, techniques, and systems in the functional area. Positions classified as an Accounting Technician regularly perform work that requires specialized knowledge of processes and procedures. We did not study the Accounting Technician classifications as part of this study process but did observe that the County should consider a more in depth analysis to distinguish Accounting Technicians that are functioning as individual contributors from those that are supervising staff performing fiscal support work. It is our experience that the addition of supervisory responsibilities as a predominant aspect of work warrants distinct classification recognition. Currently the classification indicates that positions assigned may or may not supervise.

The Professional category includes positions which require theoretical, conceptual and specialized financial accounting knowledge and expertise. Skills are typically acquired through education (relevant four-year degree), experience, specialized training and/or professional certification. Problems are typically solved through analysis and strategic thinking. Positions may be regularly involved in complex processes that have significant consequence of



error. Incumbents regularly act in a lead or supervisory capacity and routinely perform complex and difficult professional accounting functions with a high degree of complexity and independence.

1. ACCOUNTANT I/II

Key Allocation Concepts: Entry (I) and Journey (II) level professional classes that perform professional accounting work to maintain County accounting financial statements, records, reports, and related supporting documentation.

Definition: Under general supervision or direction, performs professional accounting work related to the maintenance of County accounting records and statements and the preparation of associated ledgers, journals, and reports in a centralized accounting or departmental setting; works with taxpayers to resolve assessment issues and responds to taxpayer and public inquiries; responsible for the entire departmental financials or a major section in a large department or with a County-wide perspective. Class is flexibly staffed.

Distinguishing Characteristics Accountant I:

- Entry-level class of the professional accounting series;
- Initially under close supervision, incumbents perform more routine duties while learning County policies and procedures and becoming familiar with the variety of departmental systems and practices;
- As experience is gained, duties become more diversified and are performed under more general supervision; and
- Supervises accounting technical and support staff;
- Class is flexibly staffed with Accountant II and incumbents may advance to the higher level after gaining experience and demonstrating proficiency, which meet the qualifications of the higher-level class.

Distinguishing Characteristics Accountant II:

- Journey level class in this series, fully competent to independently perform the full range of accounting duties.
- Thorough knowledge of governmental and financial accounting standards and procedures;
- Ability to add value to procedures and processes;
- The ability to exercise sound independent judgment within established guidelines;
- Skill in directing the work of others;
- Class is distinguished from Accountant/Auditor in that the latter performs internal and external audits.

2. SENIOR ACCOUNTANT

Key Allocation Concepts: Performs professional accounting work to ensure regulatory compliance with governmental accounting standards for a department, or major program area or section within an assigned department; provides recommendations for efficiencies and improvements in accounting systems; manages the effective use of department resources to



improve organizational productivity and customer service; and provides highly responsible technical assistance to management staff in assigned department.

Definition: Under general direction, supervises professional accounting work relating to accounting procedures and financial reporting or complex cost accounting related to state-mandated reporting of departmental, major program area or section operations. This classification represents a technical leader, both internally and externally, with a high degree of knowledge in the overall field and recognized expertise in specific areas. Daily oversight at this level to professional, technical, and support staff. Incumbents engage in problem-solving that frequently requires analysis of unique issues and problems without precedent and/or structure. Incumbents function with a high degree of autonomy.

Distinguishing Characteristics:

- Supervisory class in the accounting series, responsible for planning, organizing, supervising and reviewing the work of a group of professional accountants and accounting support staff.
- Incumbents serve as a technical expert in accounting and financial reporting, researching trends and patterns to develop new methods, criteria, or proposed internal controls, policies, and procedures;
- Incumbents in this class are typically assigned to manage complex projects, programs, studies, and initiatives that involve contact outside of the County;
- The work involves a high-level of problem-solving requiring analysis of unique issues or increasingly complex problems without precedent and/or structure and formulating, presenting, and implementing strategies and recommendations for resolution; and
- Work assignments are typically given as broad, conceptual ideas and directives and incumbents are accountable for overall results and responsible for developing guidelines, action plans, and methods to produce deliverables.

3. SUPERVISING ACCOUNTANT

Key Allocation Concepts: Second supervisory level professional class that oversees within a large multi-unit division of an Agency the cost and financial accounting and reporting functions; supervises through subordinates supervisory and professional staff.

Definition: plans, coordinates, organizes, and supervises an assigned work unit(s) within a large, multi-unit division within departments that have Agency-wide financial accounting and reporting responsibility; assigns, trains, motivates, and evaluates the work of professional, technical, and clerical staff; designs, modifies, and organizes assigned work processes and operational procedures to maximize assigned work unit's efficiencies and effectiveness; performs the most complex professional and technical functions as necessary; and functions as a proactive and positive member of the departmental team.

Distinguishing Characteristics:

- Second full supervisory class in the accountant series, responsible for planning, organizing, supervising and reviewing the work of a group of accountant/auditors and support staff through lower-level supervisory staff;



- Incumbents in this class are typically assigned to manage complex Agency projects, programs, studies, and initiatives;
- The work involves a high-level of problem-solving requiring analysis of unique issues or increasingly complex problems without precedent and/or structure and formulating, presenting, and implementing strategies and recommendations for resolution;
- Work assignments are typically given as broad, conceptual ideas and directives and incumbents are accountable for overall results and responsible for developing guidelines, action plans, and methods to produce deliverables; and

4. AUDITOR I/II

Key Allocation Concepts: Professional class that performs internal and external compliance, financial and performance audits.

Definition: performs a variety of complex professional audits of County departments, divisions, districts, external agencies, and funds which depending on assignment include any of the following: financial, operational, performance, and/or compliance audits; review, analyze, and audit internal and management controls and systems; prepare complex audit reports; provide recommendations for efficiencies and improvements; and supervise assigned personnel.

Distinguishing Characteristics Auditor I:

- Entry-level class of the professional auditor series;
- Knowledge of governmental and financial accounting standards and procedures;
- Initially under close supervision, incumbents perform more routine duties while learning County policies and procedures and becoming familiar with the variety of auditing procedures and practices;
- As experience is gained, duties become more diversified and are performed under more general supervision; and
- Class is flexibly staffed with Auditor II and incumbents may advance to the higher level after gaining experience and demonstrating proficiency, which meet the qualifications of the higher-level class.

Distinguishing Characteristics Auditor II:

- Journey level class in this series, fully competent to independently perform the full range of auditor duties.
- Thorough knowledge of governmental and financial accounting standards and procedures;
- Ability to add value to procedures and processes;
- The ability to exercise sound independent judgment within established guidelines;
- Class is distinguished from Accountant in that the latter performs internal and external audits.

5. SENIOR AUDITOR

Key Allocation Concepts: Supervisory level professional class that performs internal and external audits through subordinate staff and performs advanced auditing work.



Definition: Plans, organizes, supervises, and personally perform professional financial, operational, performance, and/or compliance audit work for a department, division, and/or County-wide programs and funds; reviews, analyzes, and audits internal and management controls and systems; prepares complex audit reports; provides recommendations for efficiencies and improvements; supervises professional audit staff; and provides highly responsible technical assistance to management staff in assigned department.

Distinguishing Characteristics:

- Responsible for planning, organizing, supervising and reviewing the work of auditors and support staff;
- Incumbents serve as a technical expert in auditing, researching trends and patterns to develop new methods, criteria, or proposed internal controls, policies, and procedures;
- Incumbents in this class are typically assigned to manage complex projects, programs, studies, and initiatives that involve contact outside of the County and the ability to manage multiple stakeholder interests.
- Requires a high level of technical expertise and acumen in support of management priorities;
- The work involves a high-level of problem-solving requiring analysis of unique issues or increasingly complex problems without precedent and/or structure and formulating, presenting, and implementing strategies and recommendations for resolution;
- Work assignments are typically given as broad, conceptual ideas and directives and incumbents are accountable for overall results and responsible for developing guidelines, action plans, and methods to produce deliverables; and
- Class distinguished from Accountant Auditor Supervising in that the latter has management level responsibility for both auditing and general accounting functions.

6. SUPERVISING ACCOUNTANT AUDITOR

Key Allocation Concepts: Second supervisory level professional class that oversees on a County-wide basis the financial accounting and reporting and/or auditing functions; supervises through subordinate supervisory and professional staff.

Definition: Under general direction, plans, organizes, schedules, directs, coordinates, and reviews activities, initiatives, and projects related to the County-wide internal auditing or accounting functions; performs professional internal auditing and accounting work relating to County accounting procedures and records.

Distinguishing Characteristics:

- Second full supervisory class in the accountant or auditing series, responsible for planning, organizing, supervising and reviewing the work of a group of accountant/auditors and support staff through lower-level supervisory staff;
- Incumbents serve as a technical expert in auditing, researching trends and patterns to develop new methods, criteria, or proposed internal controls, policies, and procedures;
- Incumbents in this class are typically assigned to manage complex County-wide projects, programs, studies, and initiatives;



- The work involves a high-level of problem-solving requiring analysis of unique issues or increasingly complex problems without precedent and/or structure and formulating, presenting, and implementing strategies and recommendations for resolution;
- Work assignments are typically given as broad, conceptual ideas and directives and incumbents are accountable for overall results and responsible for developing guidelines, action plans, and methods to produce deliverables; and
- Class distinguished from the Accounting Manager in that the latter has management level responsibility for both auditing and general accounting functions.

7. MANAGING ACCOUNTANT AUDITOR

Key Allocation Concepts: Manager level professional class that directs professional accounting work through subordinates relating to County-wide accounting procedures and financial reporting. Assigned to the Auditor-Controller department.

Definition: Plans, organizes, directs and manages the activities of a division within the Auditor-Controller Department including accounting and financial reporting activities of the Property Tax Management Division or the General Accounting Division; coordinates Division activities with other divisions and departments; and provides highly complex staff assistance to the Auditor-Controller.

Distinguishing Characteristics:

- Management level class responsible for the overall administration of professional accounting work relating to County-wide accounting procedures and financial reporting;
- Incumbents in this class are typically assigned to manage complex projects, programs, studies, and initiatives that involve contact outside of the County and the ability to manage multiple stakeholder interests, require a high level of technical expertise and acumen in support of management priorities, strategic initiatives, and directives, and are of high visibility and sensitivity to the County;
- Great degree of latitude for the exercise of independent judgment and decision-making; and
- Responsible for developing and implementing division and department goals, objectives and standards in addition to furthering County goals and objectives.
- Manages through subordinate supervisors.

CLASSIFICATION STUDY FINDINGS

When positions are classified, the focus is on assigned job duties and the job-related requirements for successful performance, not on individual employee capabilities or amount of work performed. Positions are evaluated and classified on-the-basis of such factors as knowledge and skill required to perform the work, the complexity of the work, the authority delegated to make decisions and take action, the responsibility for the work of others and/or for budget expenditures, contacts with others (both inside and outside of the organization), the impact of the position on the organization, and working conditions.



K&A's classification recommendations for each of the studied positions studied can be found in Appendix I.

Title Change

Title changes are recommended to more clearly reflect the level and scope being performed, as well as establish consistency with the labor market and industry standards. Compensation recommendations are not dependent upon a new title, but upon the market value as defined by job scope, level and responsibilities, and the qualifications required for successful job performance.

When evaluating the allocation of positions, it is necessary to: (i) identify the duties that the incumbents are currently being required to perform; (ii) determine if those duties are captured in the current classification description; and (iii) identify the percentage of duties being performed, if any, which are outside of the current classification. In classifications such as with the Accounting job family and Auditing job family we found that each group has knowledge specific to their functional assignment which are distinct and not easily transferable.

There were some positions where the predominant work was related to the conduct of financial, operational, performance and compliance audits and accordingly, because of the distinct experience and skill set from other accounting focused positions, the Accountant – Auditor classification was split into two series: Accountant I/II, Senior and Auditor I/II, Senior. The reason for recommending a new Auditor classification series is because of the experience level and skill set of this function requires not only an understanding of accounting systems but identifying means to test their reliability which is considered distinct from the skill set needed to perform the work related to accounting for County funds and accounts.

Table 1. Title Change Recommendations

Current Classification Title	Proposed Classification Title
Accountant Auditor I	Accountant I (11 positions)
Accountant Auditor II	Accountant II (13 positions)
Accountant Auditor I/II (Vacant)	Accountant I/II (4 Vacant positions)
Accountant Auditor Senior	Senior Accountant (10 positions)

There were some positions assigned to the Accountant series that more closely aligned with a supervisor of accounting support staff rather than a professional level accountant but with the limitations of not closely studying the body of work performed at the Accounting Technician level, complicated by the Accounting Technician classification allowing for supervisory duties that in our opinion should be distinguished in a separate classification, we did not have enough information to recommend changes to classification assignment.



Reclassification

Reclassification recommendations are made for positions that are working out of class due to level and scope of work and/or job functions that have been added or removed from those positions over time.

Supervising Accountant. We observed a few Senior Accountant Auditor positions that were operating at a level more akin to the Supervising Accountant- Auditor, in that they had responsibility for multiple units of accounting functions with Agency-wide responsibility, requiring a significantly larger number of direct reports. The preponderance of their time was spent managing the functional assignments and supervising staff, through lead workers. In addition, considerable time was spent improving the efficiency of operations and managing resources. This classification differed from the Supervising Accountant-Auditor in that it did not have the county-wide breadth of knowledge required of those assigned to the Auditor Controllers office. Accordingly, we recommended that a new Supervising Accountant classification be created to capture this distinct level of work.

Additionally, there was one position within the Administrative Services Officer (ASO) series, that differed from other positions in the series, in that the body of work was solely focused on Accounting related duties, similar to a Supervising Accountant, in contrast to other ASO positions that had a wider range of administrative functional oversight such as human resources or information technology.

Accountant I. There was one position where the preponderance of work was related to ensuring compliance with administrative and fiscal processes for a narrow aspect of department operations and did not have a larger perspective on department-wide financial operations. This contrasted with other positions assigned to this classification. It was our opinion that it fell more in line with an Accounting Technician based on the description only. However, upon further review with management, we were informed that due to staffing issues, the position was involved in covering a lower level position due to incumbent absence, and accordingly had not been assigned the full scope of professional responsibilities. There was indication that the responsibility level of this position was evolving. Accordingly, since at the time of the study this position was not performing the full scope of responsibility, we recommend that it be reclassified to an Accountant I.

Another position was involved in fiscal recordkeeping for division within a department where the span of control and scope of responsibility was more limited than many of the positions placed within the Accounting series. The expectation for an Accountant is that it would encompass all fiscal aspects of a section or division including financial statement production and the regular reliance on financial and governmental accounting principles and procedures in performing the work. The position's focus involves a narrower scope, predominantly limited to transactional accounting, compiling data, and day to day operations as opposed to preparing full departmental budgets and trial balances and improving department wide accounting and financial systems. There was indication that the responsibility level of this position was evolving, including assignment of support staff supervision. Accordingly, since at the time of the study this position was not performing the full scope of responsibility, we recommend that it be reclassified to an Accountant I.



Table 2. Reclassification Recommendations

Current Classification Title	Proposed Classification Title
Accountant Auditor II	Auditor II (2 position)
Accountant Auditor I/II	Auditor I/II (Vacant)
Accountant Auditor, Senior	Auditor, Senior (2 position)
Accountant Auditor, Senior	Supervising Accountant (5 positions)
Senior Administrative Services Officer	Supervising Accountant (1 position)
Accountant Auditor II	Accountant I (2 positions)

Classification Description Update

As a general recommendation, the current classification descriptions for the Accountant and Auditor series need to be updated to reflect the current work performed. The general issues K&A identified that needed to be updated in the classification descriptions included revised duty statements and distinguishing characteristics.

The revised descriptions are included in Appendix II.

Classification Plan Maintenance

In the maintenance of the classification plan when an employee is assigned an additional duty or responsibility and requests a change in classification, it is reasonable to ask:

- What additional knowledge and skills are required to perform the duty?
- How does one gain this additional knowledge and skills – through extended training, through a short-term seminar, through on-the-job experience?
- Does this duty or responsibility require new or additional supervisory responsibilities?
- Is there a greater variety of or are there more complex problems that need to be solved as a result of the new duty?
- Does the employee have to make a greater variety of or more complex decisions as a result of this new duty?
- Are the impacts of decisions greater because of this new duty (effects on staff, budget, department or County-wide activities, and/or relations with other agencies)?
- Are guidelines, policies, and/or procedures provided to the employee for the performance of this new duty?



- Is the employee interacting with County workers, the public, or others differently as a result of this new assignment?
- Have the working or physical conditions of the job changed as a result of this new assignment?

Asking these questions and analyzing the factors listed under the Study Finding section of the report will enable the County to maintain the classification system in a consistent manner.

Internal Alignments

While analyzing internal relationships, the same factors analyzed when comparing the County's classifications to the labor market are used when making internal salary alignment recommendations. Where it is difficult to ascertain internal relationships due to unique qualifications and responsibilities, market reference should be made.

In addition, below are standard human resources practices that are commonly applied, when making salary recommendations based upon internal relationships, as follows:

- Standard internal percentages should be applied to the new classifications.
- When a market or internal equity adjustment is granted to one class in a series, the other classes in the series are also adjusted accordingly to maintain internal equity.

Internal equity between certain levels of classification is a fundamental factor to be considered when making salary decisions. Careful consideration needs to be given to these alignments because they represent internal value of classifications within job families, as well as across the organization. It is important for County management to carefully review these internal relationships and determine if they are still appropriate given the current market data.

It is important to analyze market data and internal relationships within class series as well as across the organization, and adjust salary range placements as necessary based on the needs of the organization.

CONCLUSION

The result of the classification study was to separate the Accounting Auditor classification series into two distinct series specifically and Accountant series and an Auditor series. We also created a new Supervising Accountant classification to distinguish those positions that had Agency-wide responsibility, requiring the preponderance of their time to be spent managing the functional assignments and supervising staff with considerable time spent improving the efficiency of operations and managing resources.

We want to thank the County of Placer for its time and cooperation in bringing this study to a successful conclusion. It has been a pleasure working with the County on this critical project. Please do not hesitate to contact us if we can provide any additional information or clarification regarding this report.



Respectfully Submitted,
Koff & Associates

Katie Kaneko, President



**PLACER COUNTY
HUMAN RESOURCES DEPARTMENT**

145 Fulweiler Avenue, Suite 200
Auburn, California 95603

COMMISSIONERS
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Paula Hood, Commission Clerk
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MEMORANDUM

To: Civil Service Commission
From: Lori Walsh, Human Resources Director
By: Kathy Youngs, Sr. Human Resources Analyst *KYoung*
Date: July 10, 2017
Subject: Executive Secretary – Reclassification Request and Non-Competitive Promotion

Recommendation

It is recommended the Civil Service Commission approve:

- The reclassification of an Executive Secretary GNRL Grade 76 (\$4,032.36 - \$4,901.43 monthly) to the classification of Administrative Technician GNRL Grade 76 (\$4,032.36 - \$4,901.43 monthly) and the non-competitive promotion of the current incumbent pursuant to County Code section 3.08.480.

Background

At the request of the Risk Management - General Liabilities division of the County Executive's Office, Human Resources (HR) conducted a classification review of their Executive Secretary allocation, where the incumbent is currently underfilling the position as an Administrative Secretary. HR reviewed the Position Inventory Questionnaire (PIQ) completed by the incumbent, performed a desk audit and met with the Assistant Risk Manager and the Risk Management Administrator to clarify outstanding questions.

Basis for Recommendation

A review of the PIQ, information obtained through the desk audit, discussions with the Assistant Risk Manager and the Risk Management Administrator, and a comparison with the other Administrative Technician position in the General Liabilities division as well as other Administrative Technician positions throughout the county, it was determined that the duties and tasks assigned to this position, and performed by the incumbent, currently underfilling as an Administrative Secretary, are consistent with duties assigned to the Administrative Technician classification, not the Executive Secretary classification. Also, the current duties assigned to this position have evolved beyond that of an Administrative Secretary, as it is being underfilled,

and are more appropriately aligned to the Administrative Technician classification. On a side note, the Executive Secretary classification, as allocated, is typically allocated one per department and provides direct support to a department head, which is not a duty performed by the incumbent in this position.

Typical duties assigned to an Administrative Technician position include providing responsible para-professional administrative and technical assistance by coordinating, monitoring and reporting on various departmental activities of a routine and recurring nature. It has been determined that the incumbent has been assigned the higher level duties and responsibilities including, but not limited to:

- Assessing, researching, compiling and maintaining information that comes into the department regarding Liability claims against the county. Logging information and researching the history of claimants to determine whether there are previous and/or pending cases.
- Creating, developing, updating and maintaining data and records in the IVOS Claims Management System.
- Providing rating premium costs for special event insurance applications submitted from the public when renting county owned facilities and independently determining the level of insurance the renter requires.
- Determining the appropriate insurance agency to use based on the Insurance guidelines requirements from the Department of Insurance and Underwriting Broker Guidelines and also based on the best interest of the county and the person requesting insurance for the event planned in a county owned facility
- Logging and compiling reports of all vendor contracts that are approved by the Placer County Board of Supervisors.
- Periodically providing technical and functional lead supervision to extra help staff assigned to the General Liability Division.

Pursuant to County Code 3.08.520, the employee impacted by this reclassification has been notified of the recommendation and the action to move the request forward to the Civil Service Commission at today's date.

Pursuant to County Code 3.08.480, it has been verified that the incumbent meets the minimum qualifications of the proposed classification and has been assigned and performing the duties successfully for not less than one year. Therefore, it is requested that the incumbent be non-competitively promoted to the classification of Administrative Technician.

Attached for your review is the organizational chart for the CEO General Liability Division. The County Executive Office concurs with the recommendation described above.

Attachment – CEO General Liability Org Chart

cc: David Boesch, County Executive Officer
Joe Ney, Assistant Risk Manager
Jim Kotey, Risk Management Administrator
Daniel Vick, Management Analyst
Chad Fenstermacher, Budget Analyst

David Boesch
County Executive Officer

~~XXXXXXXXXX~~
Asst. County Executive
Officer

~~XXXXXXXXXX~~
Deputy CEO/CFO
Finance / Administration

Risk Management –
General Liability

~~XXXXXXXXXX~~
Asst. Risk Manager

~~XXXXXXXXXX~~
Risk Mgmt.
Administrator

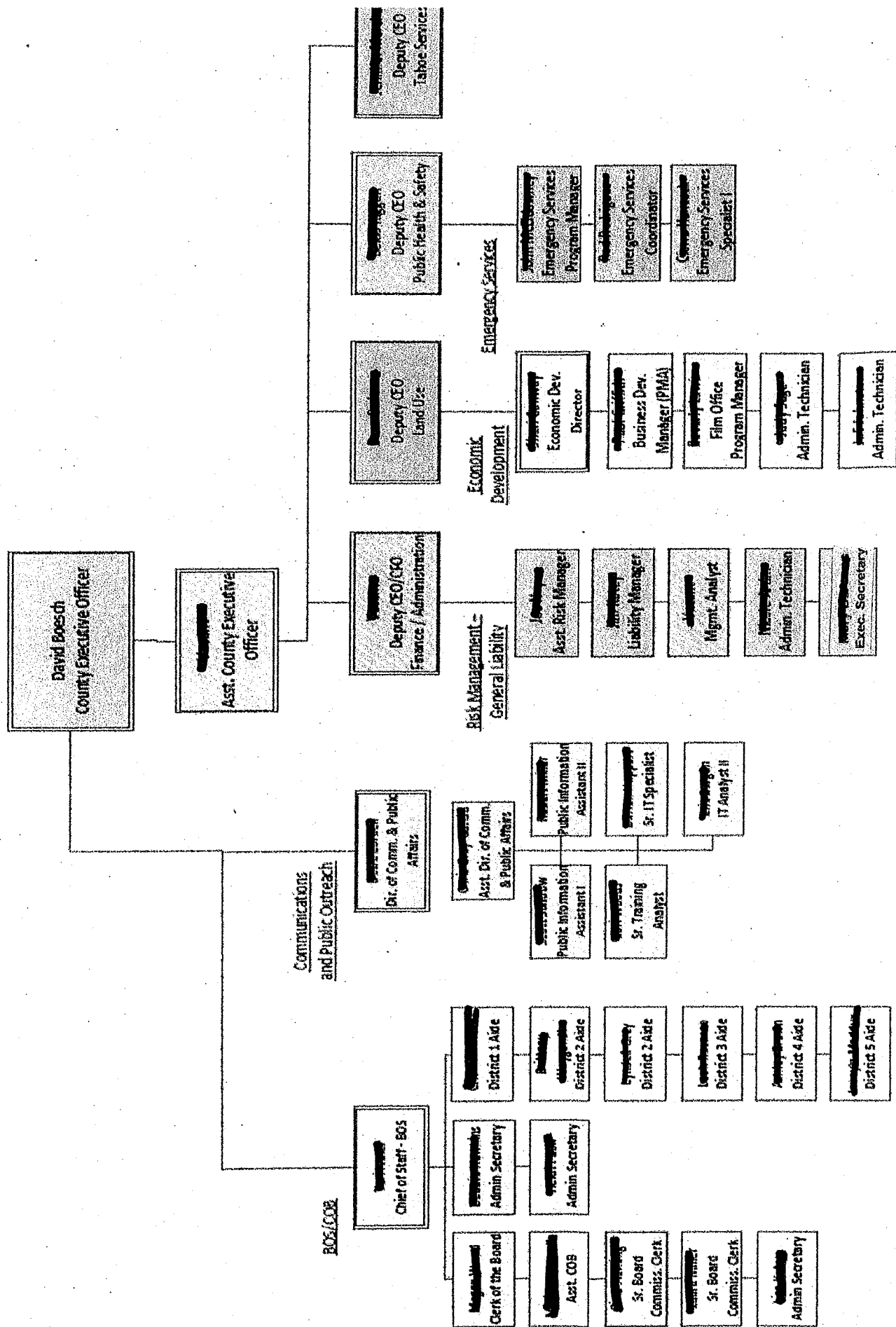
~~XXXXXXXXXX~~
Safety Officer

~~XXXXXXXXXX~~
Mgmt. Analyst

~~XXXXXXXXXX~~
Admin. Technician

~~XXXXXXXXXX~~
Exec. Secretary

County Executive Office / Divisions Staff Organization / Program Oversight





PLACER COUNTY
HUMAN RESOURCES DEPARTMENT
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MEMORANDUM

To: Civil Service Commission
From: Lori Walsh, Human Resources Director
By: Kathy Youngs, Senior Human Resources Analyst
Date: July 10, 2017
Subject: Request for Classification Specification Revisions – Economic Development Specialist and Economic Development Specialist - Senior

Recommendation

It is recommended that the Civil Service Commission approve the proposed revisions to the Economic Development Specialist and Economic Development Specialist - Senior classification specifications.

Background

The Economic Development division of the County Executive's Office has requested to add a new position allocation to their 2017/2018 budget for the classification of Economic Development Specialist – Senior, which was last utilized in 2011. In anticipation of filling this position, management staff in Economic Development reached out to Human Resources to discuss the process of how to recruit for this position, once it is approved in the budget.

A review of the Economic Development Specialist and Economic Development Specialist – Senior classification specifications found that they were due to be updated.

Basis for Recommendation

The Economic Development division is responsible for attracting, retaining and expanding businesses in Placer County. It has been six years since the Economic Development Specialist – Senior position was vacated and unfunded, and now, with the economy recovering from the recession, there is a need to revitalize the classification series in order to hire staff to collect, compile and analyze data regarding economic conditions and bring businesses and jobs into

July 10, 2017

Classification Specification Revision Request – Economic Development Specialist and
Economic Development Specialist - Senior

Page 2

Placer County. The classification specifications when originally written, provided a more generic representation of the essential job duties. While the changes to the classification specifications are relatively minor, the updates provide more specificity of the job duties, offering a greater understanding of the essential duties required to perform the job. The classification specifications provide further details regarding the responsibility for developing grant applications and reports as well as administering, monitoring and evaluating contracts.

Attached for the Commission's review and consideration are copies of the draft updated Economic Development Specialist classification specifications and the County Executive's Office – Economic Development division organization chart. The Business Agent for PPEO/Stationary Engineers Local 39, the County Executive Office and management in the Economic Development division have all reviewed the draft classification specifications and agree with the recommended changes.

Attachments:

Attachment 1: Job Specifications

Attachment 2: CEO – Economic Development Organizational Chart

cc: David Boesch, CEO
Sherri Conway, Director of Economic Development
Paul Griffith, Principal Management Analyst
James Importante, Senior Management Analyst
James Britton, Business Representative, IUOE Stationary Engineers Local 39

ECONOMIC DEVELOPMENT SPECIALIST

DEFINITION

To perform a variety of analytical and technical duties in support of the County's economic development policy; to provide information and assistance to developers and the public; and to provide ~~professional staff~~ assistance to the Director of Economic Development.

DISTINGUISHING CHARACTERISTICS

The Economic Development Specialist is the journey level class within the Economic Development Specialist series and is assigned the full range of duties. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating policies and procedures of the Office of Economic Development.

SUPERVISION RECEIVED AND EXERCISED

Receives immediate supervision and direction from the Director of Economic Development and may receive technical and functional supervision from the Senior Economic Development Specialist.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

Collect, compile and analyze data ~~about~~ regarding economic conditions and projects; prepare informational and promotional reports, illustrative charts, tables and graphs, and press releases.

Research, establish and maintain various files and data bases regarding economic development; ~~Organize and analyze including market conditions, new program information, grant opportunities and availability of land and buildings~~ other economic development programs; propose development implementation plans.

Develop grant applications and reports; compute, collect, monitor and track grant data on an on-going basis; provide statistics as appropriate.

Administer, monitor and evaluate contracts; participate in negotiating contracts with outside vendors, consultants or organizations; monitor fiscal and legal liabilities of the same; assist with contract management and administration.

PLACER COUNTY

Economic Development Specialist (Page 2)

Respond to inquiries from County staff, developers, prospective industries, other businesses and the general public; determine focus/needs of inquiries and respond as specifically as possible; ~~and make referrals and/or introductions as appropriate.~~

~~Provide technical assistance or guidance in various permit, loan and other application processing including one-stop film industry permit process working with various public agencies including but not limited to local sheriff and fire departments, U.S. Forest Service, State Parks, California Highway Patrol and Placer County Water Agency.
Act as Recycling Market Development Zone Administrator.~~

Act as liaison with businesses and public/private agencies; assist in arranging meetings, conference and public information programs; and make presentations as directed.

Participate in tradeshow throughout the state representing the Office of Economic Development.

Work with local county and city officials for retention and expansion of existing businesses and recruitment of new businesses.

Prepare a variety of comprehensive studies, proposals and reports related to program activities and assigned projects.

Prepare appropriate agenda reports, informational materials and other written materials regarding the County's Economic Development program and related activities.

Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

- Research methodology, including statistical evaluation and presentation.
- Principles of economics.
- Principles of economic development, including relationship of real estate, land development and financing.
- Basic techniques of industrial and economic development.
- Basic mathematical principles.
- Preparation and presentation of informational and promotional materials.
- Inter-agency relationships, including recognition of overlapping and/or complementary requirements.

PLACER COUNTY

Economic Development Specialist (Page 3)

- Land development process and commercial building codes.
- Intra-governmental structure and dynamics, including the roles of local, regional, state and federal jurisdictions in the development process.
- Community-based organizations interested in the promotion of industry, business and private-public partnerships.
- Computer software, including word processing, spreadsheet and graphics applications.
- Modern office procedures, methods and computer equipment.

Ability to:

- On a continuous basis, know and understand all aspects of the job; intermittently analyze work papers, reports and special projects; identify and interpret technical and numerical information; observe and problem solve operational and technical policy and procedures.
- On a continuous basis, sit at desk for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone, write or use a keyboard to communicate through written means; and lift light weight.
- ⊗ Prepare informational and promotional reports and materials, including press releases.
- ⊗ Perform mathematical and statistical calculations accurately.
- Analyze grants, reports and various proposals.
- Compile, analyze and present statistical data in a meaningful way.
- Establish and maintain a wide network of public and private resource contacts.
- Understand and interpret the County's economic development policy as directed by the Board of Supervisors and carried out by the Director of Economic Development.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- Obtain information through interviews; work with interruption; and work firmly and courteously with the public.
- Analyze situations quickly and objectively and to determine proper course of action.
- Use a computer, calculator, typewriter, telephone, facsimile machine, postage meter and photocopy machine.
- Communicate clearly and concisely, both orally and in writing.
- ⊗ Establish and maintain effective working relationships with those contacted in the course of work.

Experience and Training

- Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

One year of responsible professional economic development experience.

Training:

Equivalent to a ~~bachelor's~~ Bachelor's degree from an accredited college or university with major course work in business or public administration, economics, or a related field.

License or Certificate:

- May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

SENIOR ECONOMIC DEVELOPMENT SPECIALIST - SENIOR**DEFINITION**

To perform a variety of the more difficult and complex analytical and technical duties in support of the County's economic development policy and program objectives; to provide information and assistance to County staff, developers and the public; and to provide ~~professional staff~~ assistance to the Director of Economic Development.

DISTINGUISHING CHARACTERISTICS

This is the advanced journey level classification within the Economic Development Specialist series. This class is distinguished from the Economic Development Specialist class by the assignment of the more difficult and complex analytical studies associated with the Economic Development and research program activities. The ~~Senior Economic Development Specialist - Senior~~ may also exercise technical and functional supervision over ~~professional, technical and clerical staff~~ as assigned.

The Economic Development Specialist is the ~~entry-journey~~ level class within the Economic Development Specialist series and is assigned the full range of duties. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating policies and procedures of the ~~Department Office~~ of Economic Development.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction and supervision from the Director of Economic Development and may exercise technical and functional supervision over assigned staff.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

Collect, compile and analyze data ~~about~~ regarding economic conditions and projects; prepare informational and promotional reports, illustrative charts, tables and graphs, and press releases.

Research, establish and maintain various files and data bases regarding economic development; ~~Organize and analyze including market conditions, new program information, grant opportunities and availability of land and buildings~~ other economic development programs; propose development implementation plans.

Develop grant applications and reports; compute, collect, monitor and track grant data on an on-going basis; provide statistics as appropriate.

PLACER COUNTY

Senior Economic Development Specialist (Page 2)

Administer, monitor and evaluate contracts; participate in negotiating contracts with outside vendors, consultants or organizations; monitor fiscal and legal liabilities of the same; assist with contract management and administration.

Respond to inquiries from County staff, developers, prospective industries, other businesses and the general public; determine focus/needs of inquiries and respond as specifically as possible; and make referrals and/or introductions as appropriate.

~~Provide technical assistance or guidance in various permit, loan and other application processing including one-stop film industry permit process working with various public agencies including but not limited to local sheriff and fire departments, U.S. Forest Service, State Parks, California Highway Patrol and Placer County Water Agency.~~

Act as liaison with businesses and public/private agencies; assist in arranging meetings, conference and public information programs; and make presentations as directed.

Participate in tradeshow throughout the state representing the Office of Economic Development.

Work with local county and city officials for retention and expansion of existing businesses and recruitment of new businesses.

Prepare a variety of comprehensive studies, proposals and reports related to program activities and assigned projects.

Coordinate and perform administrative and technical duties necessary to achieve program goals and objectives.

Prepare appropriate agenda reports, informational materials and other written materials regarding the County's Economic Development program and related activities.

Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

- Research methodology, including statistical evaluation and presentation.
- Principles of economics.

PLACER COUNTY

Senior Economic Development Specialist (Page 3)

- Principles of economic development, including relationship of real estate, land development and financing.
- Advanced math principles.
- Principles and practices of supervision, training and personnel management.
- Basic techniques of industrial and economic development.
- Preparation and presentation of informational and promotional materials.
- Inter-agency relationships, including recognition of overlapping and/or complementary requirements.
- Land development process and commercial building codes.
- Intra-governmental structure and dynamics, including the roles of local, regional, state and federal jurisdictions in the development process.
- Community-based organizations interested in the promotion of industry, business and private-public partnerships.
- Computer software, including word processing, spreadsheet and graphics applications, GIS (Geographic Information Systems) experience using ESRI Platform.
- Modern office procedures, methods and computer equipment.

Ability to:

- On a continuous basis, know and understand all aspects of the job; intermittently analyze work papers, reports and special projects; identify and interpret technical and numerical information; observe and problem solve operational and technical policy and procedures.
- On a continuous basis, sit at desk for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone, write or use a keyboard to communicate through written means; and lift light weight.
- Analyze complex issues and problems, identify and evaluate alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.
- Prepare informational and promotional reports and materials, including press releases.
- Compile, analyze and present statistical data in a meaningful way.
- Perform complex mathematical and statistical calculations accurately.
- Analyze grants, reports and various proposals.
- Establish and maintain a wide network of public and private resource contacts.

PLACER COUNTY

Senior Economic Development Specialist (Page 4)

- Understand and interpret the County's economic development policy as directed by the Board of Supervisors and carried out by the Director of Economic Development, under direction of the County Executive Officer.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- Obtain information through interviews; work with interruption; and work firmly and courteously with the public.
- Exercise initiative and sound judgement in solving difficult and complex administrative and technical problems.
- Use a computer, calculator, typewriter, telephone, facsimile machine, ~~postage meter~~ and photocopy machine.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

Experience and Training

- Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

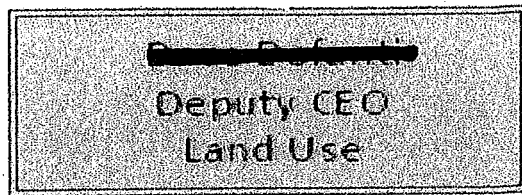
Three years of responsible professional economic development experience.

Training:

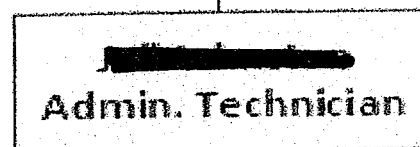
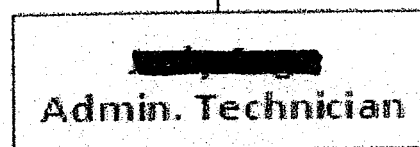
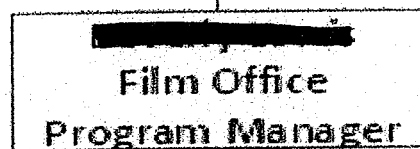
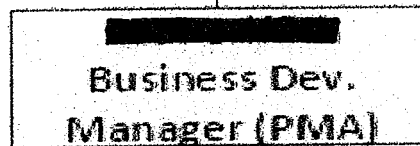
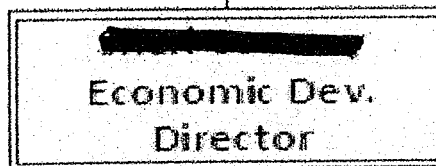
Equivalent to a Bachelor's ~~Bachelor's~~ degree from an accredited college or university with major course work in business, finance, public administration, economics, or a related field.

License or Certificate:

- May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.



Economic
Development



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MEMORANDUM

DATE: July 10, 2017
TO: Civil Service Commission
FROM: Lori Walsh, Human Resources Director
SUBJECT: Review of Merit Increases for Eligible Classified County Employees

During the closed session of your meeting, your Commission will review the performance evaluations of classified County employees pursuant to Government Code Section 54957. For those classified County employees determined to be eligible for a merit increase, the following motion is submitted for your consideration:

Motion to approve the classified merit awards set forth in the list dated July 10, 2017, pursuant to Section 3.04.650 of the County Code.